Improve Order Entry Process Using JD Edwards EnterpriseOne Order Guides

Meeting the Demands of High Volume Order Entries

October 2019

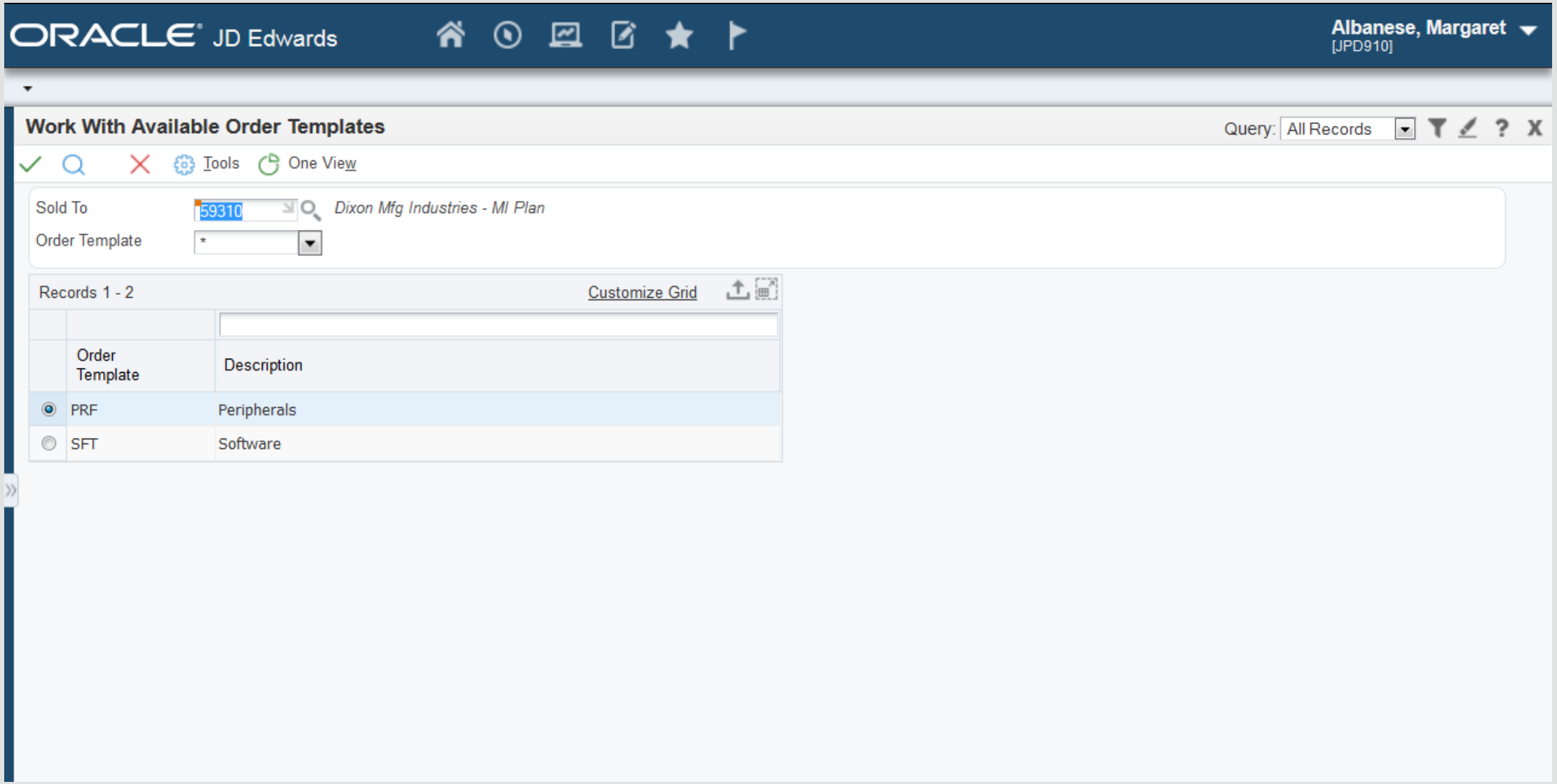
Agenda

1. What is the Business Problem?
2. The Solution–Order Guides Enhancement

What is the Business Problem?

- Some industries have unique requirements that cannot be addressed by JD Edwards EnterpriseOne configuration options or base functionality
- For instance, suppliers to the food service industry including the restaurant industry routinely sell the same products to repeat customers, often on a daily basis.
- As a result, suppliers have high-volume order entries. Similarly, high-volume order entries are also generated through tele-sales

Standard Order Template



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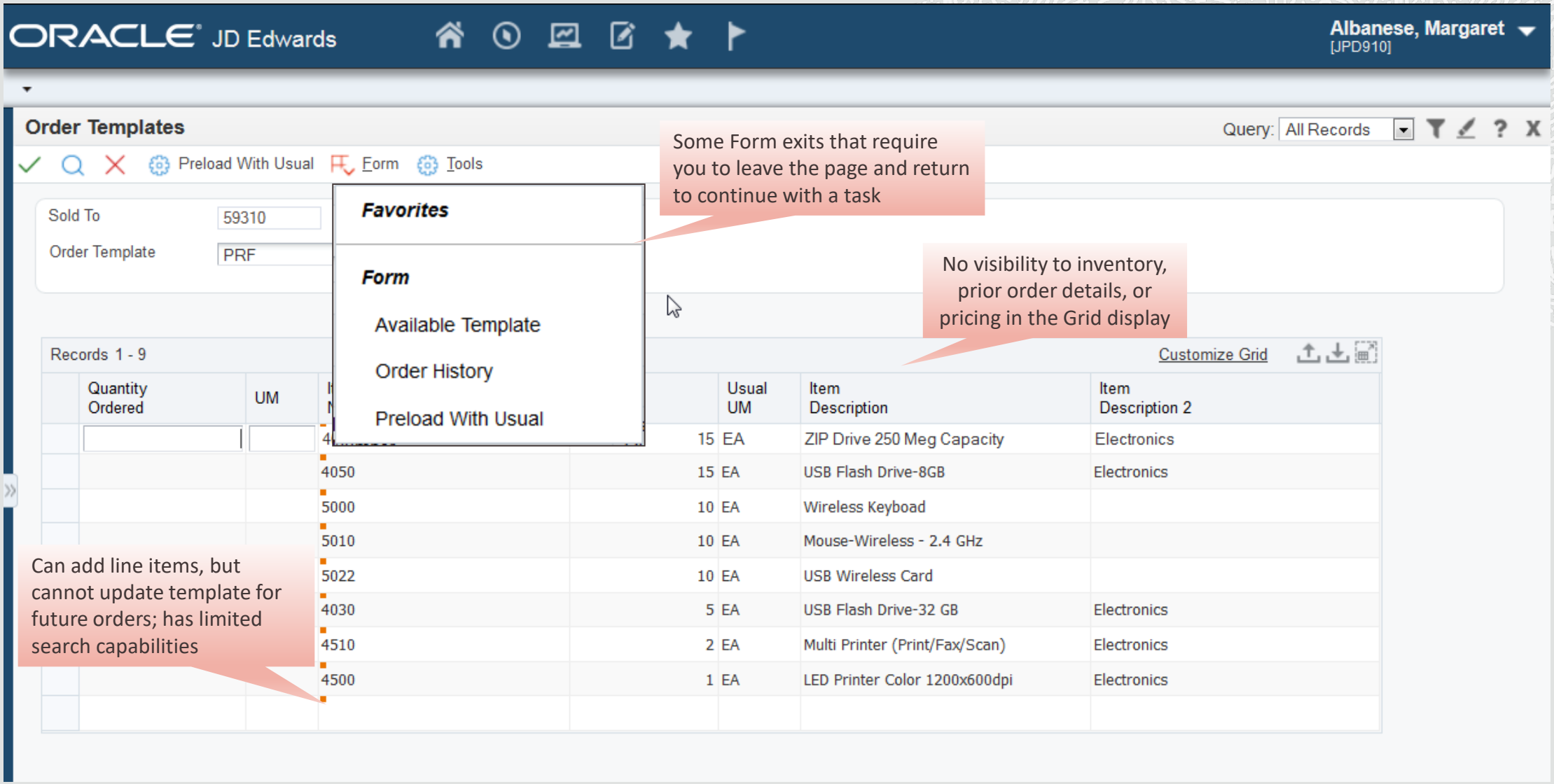


The Solution–Order Guides

- Order Guides is a fully functional enhancement that offers a user friendly alternative to the standard order templates application
- The enhancement enables sales personnel to more quickly create orders for regular customers and frequently ordered items
- This enhancement is designed to be “minimally intrusive”, and requires no modifications to the base Sales Order Entry (P42101) application, or any of the underlying Sales Order Entry applications

Order Guides-Features

The enhancement enables sales personnel to create orders more quickly for regular customers and frequently ordered items.

You can create templates of items by customer and associate customers with CSR. This association provides easy access to information during sales order entry.

You can view a customer’s credit and order details. Additionally, when an order is updated, the system recalculates the order total and available credit amounts.

Order Guides-Features

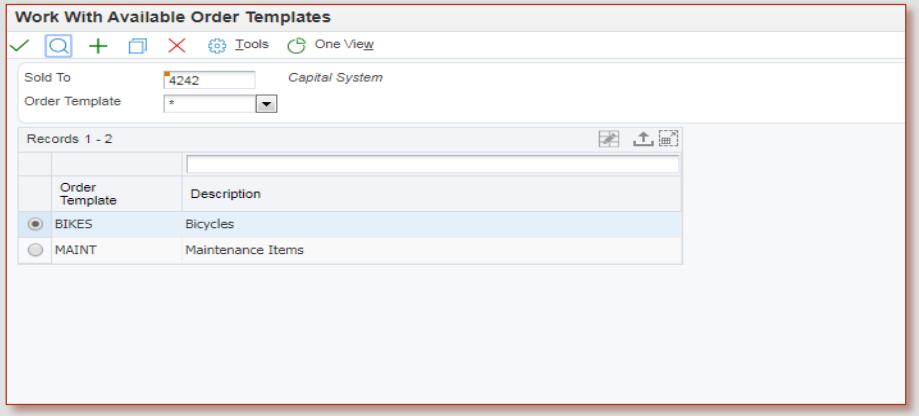
The system automatically update the Quantity Ordered field for each item in the detail area with predetermined values by clicking the Usual Quantities button.

You can view items that were ordered by a customer during a previous time frame, for example, in the last 30 days

You can view and update the price and profit margin for each line in the detail area

Setting Up JD Edwards EnterpriseOne Order Guide

- Create templates using the Order Templates program
- Assign sales team members to customers
- Set processing options for the My Customers program
- Leverage personalization to meet needs



- Set processing options for the Order Guides Power Edit program
- Set the order guide-related processing options for the Sales Order Entry program

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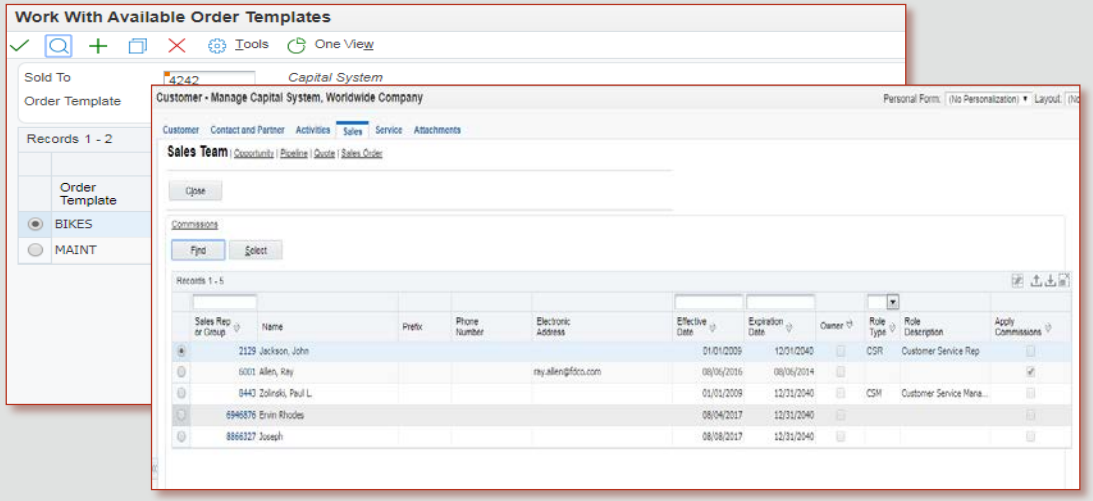

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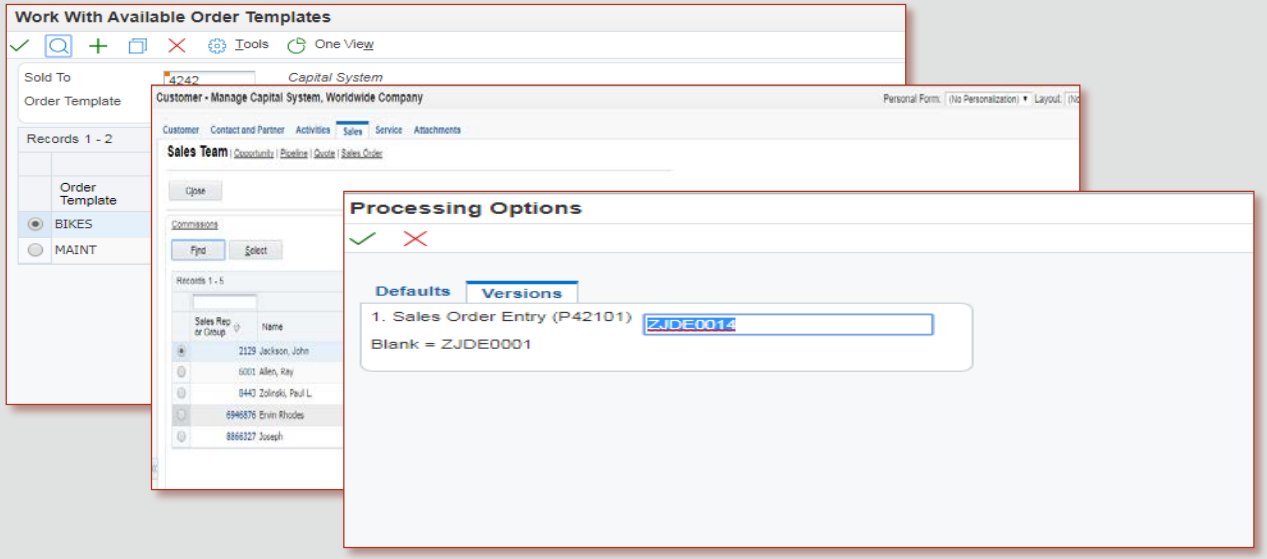

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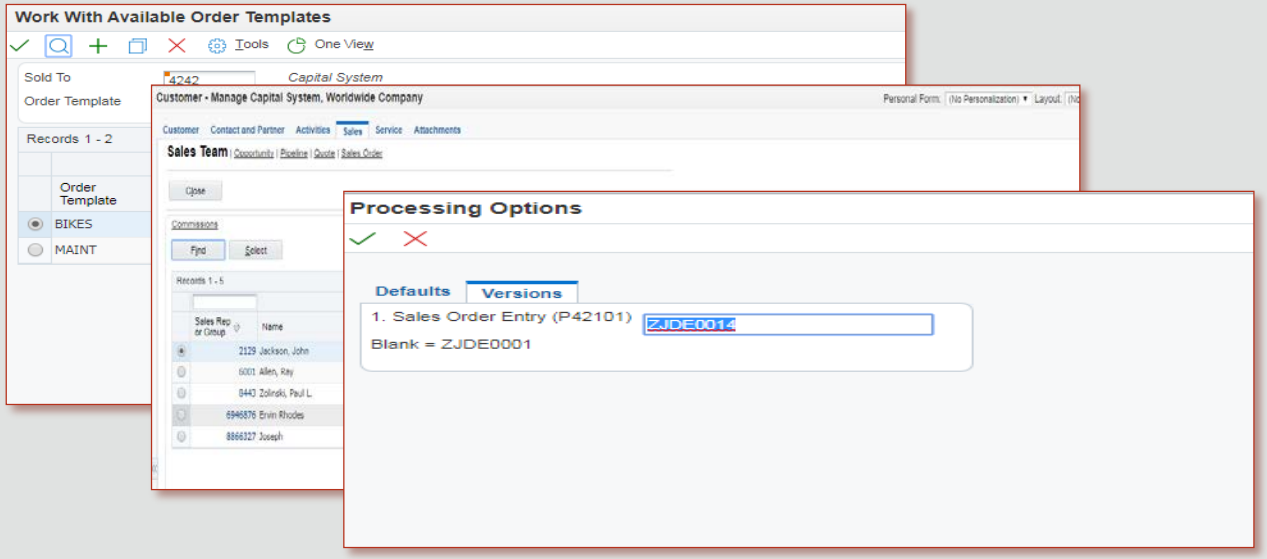

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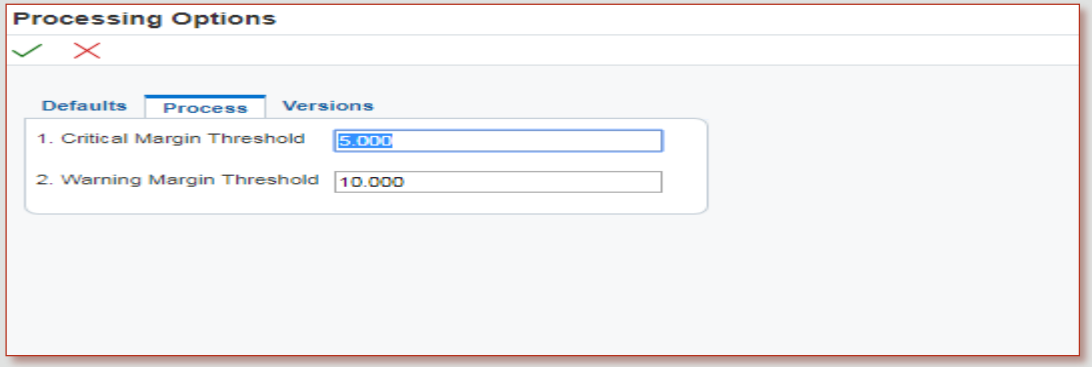

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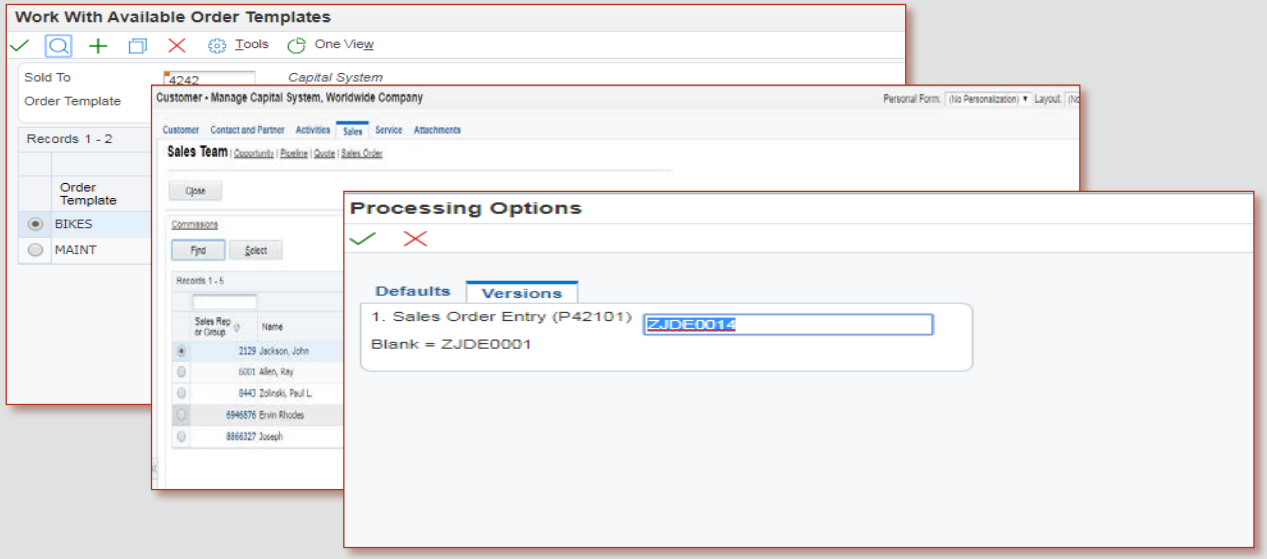

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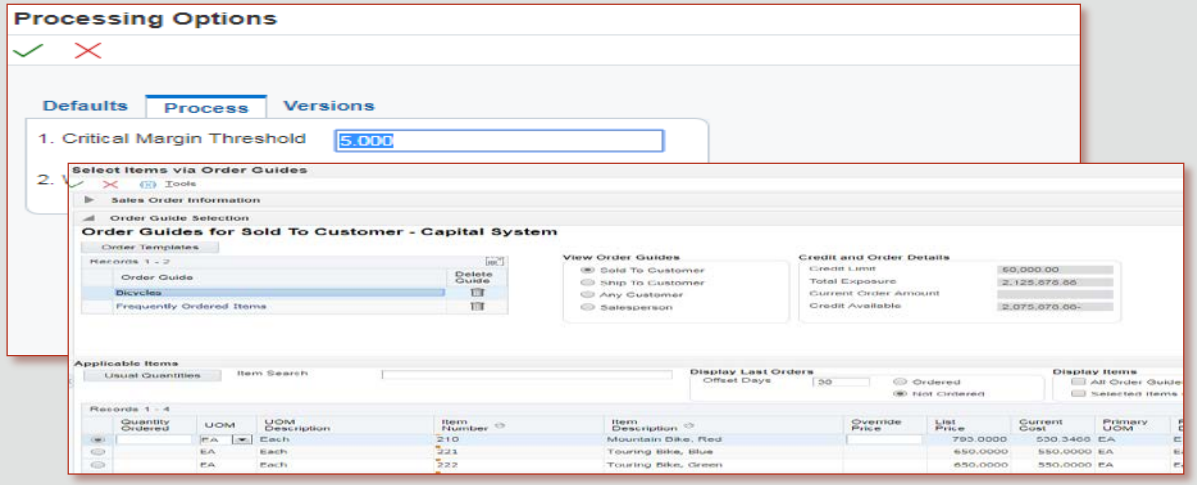
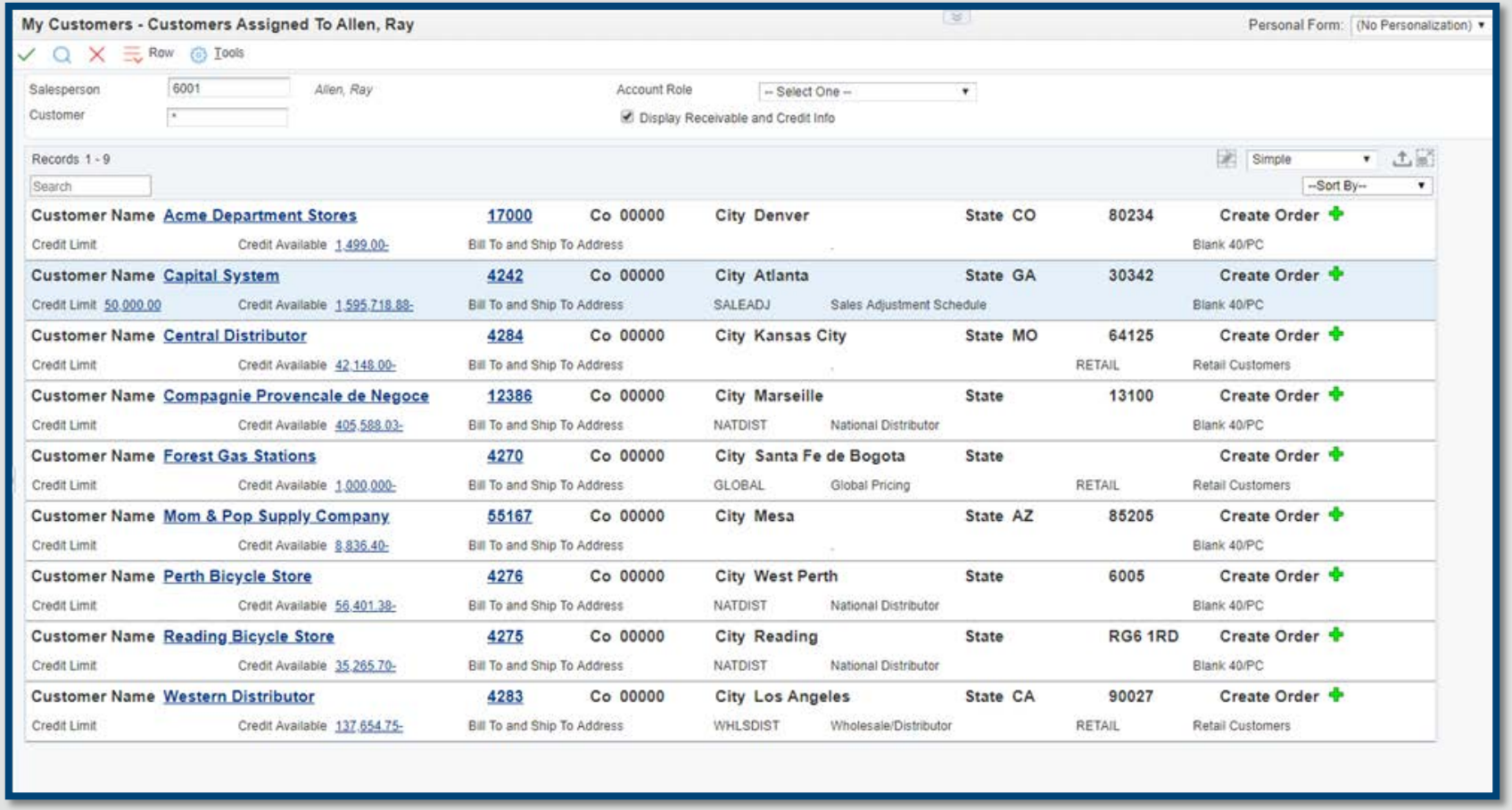


Order Guides–Standard Features



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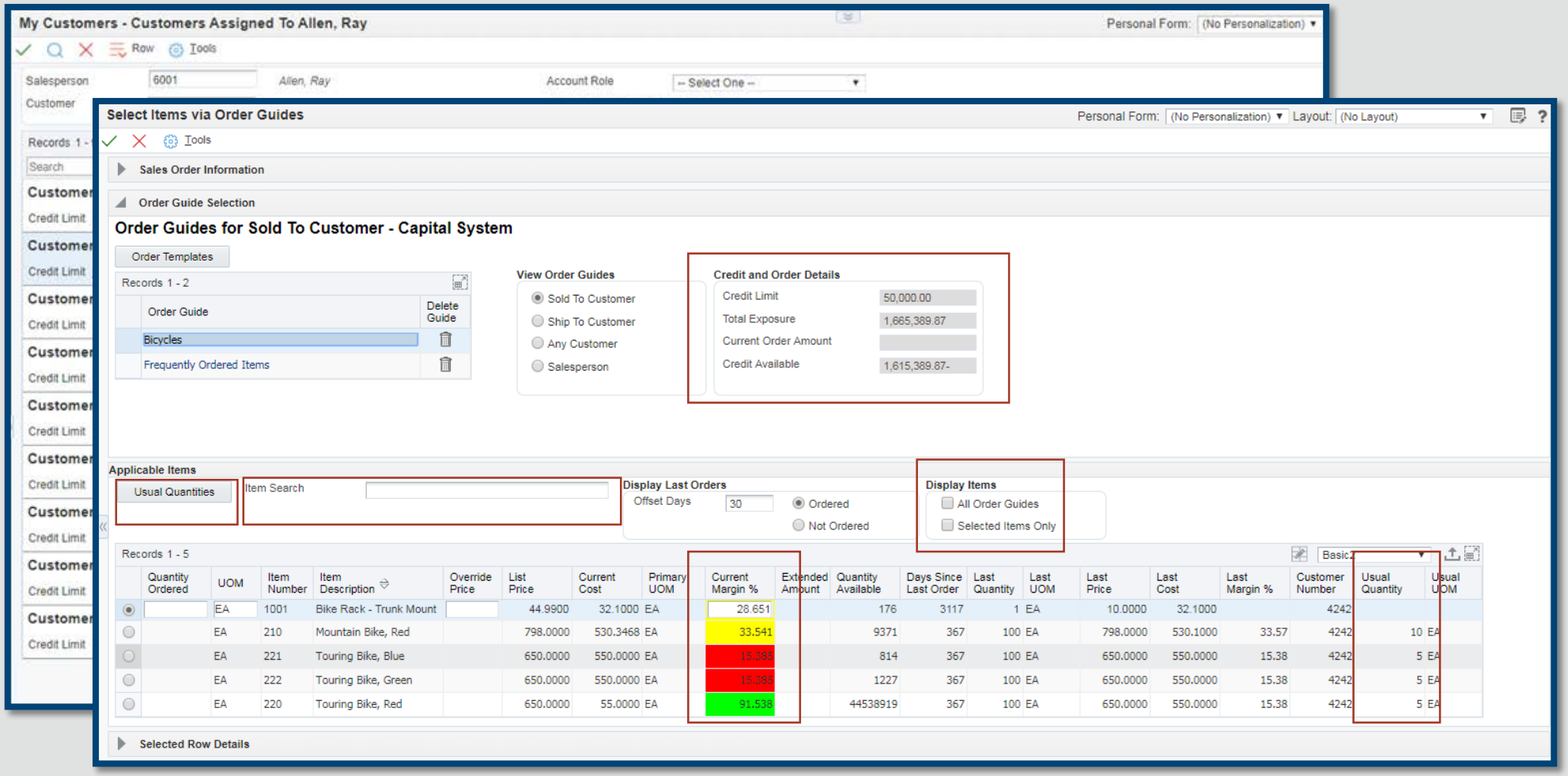
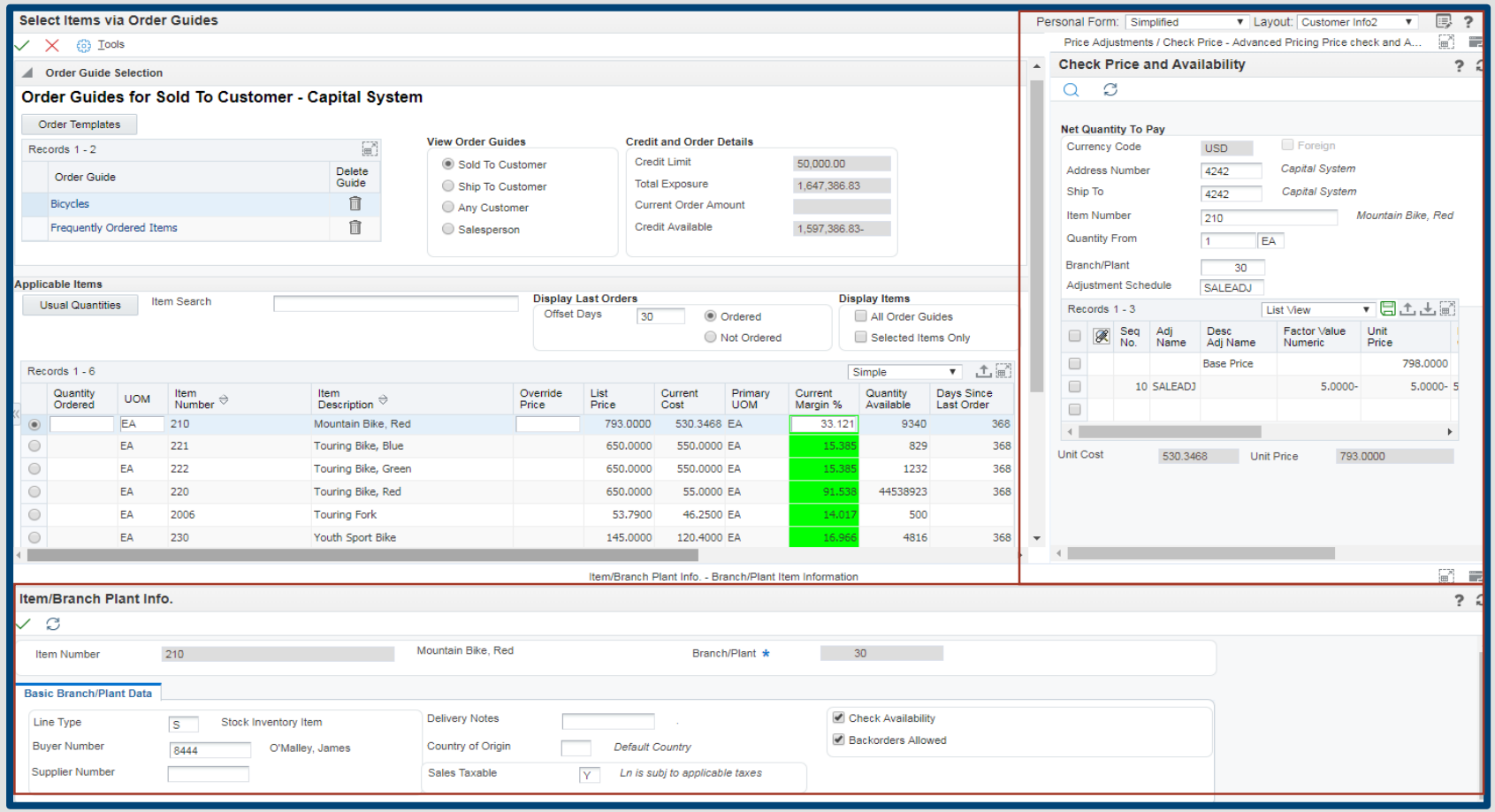


Extend Order Guides Features with Personalization



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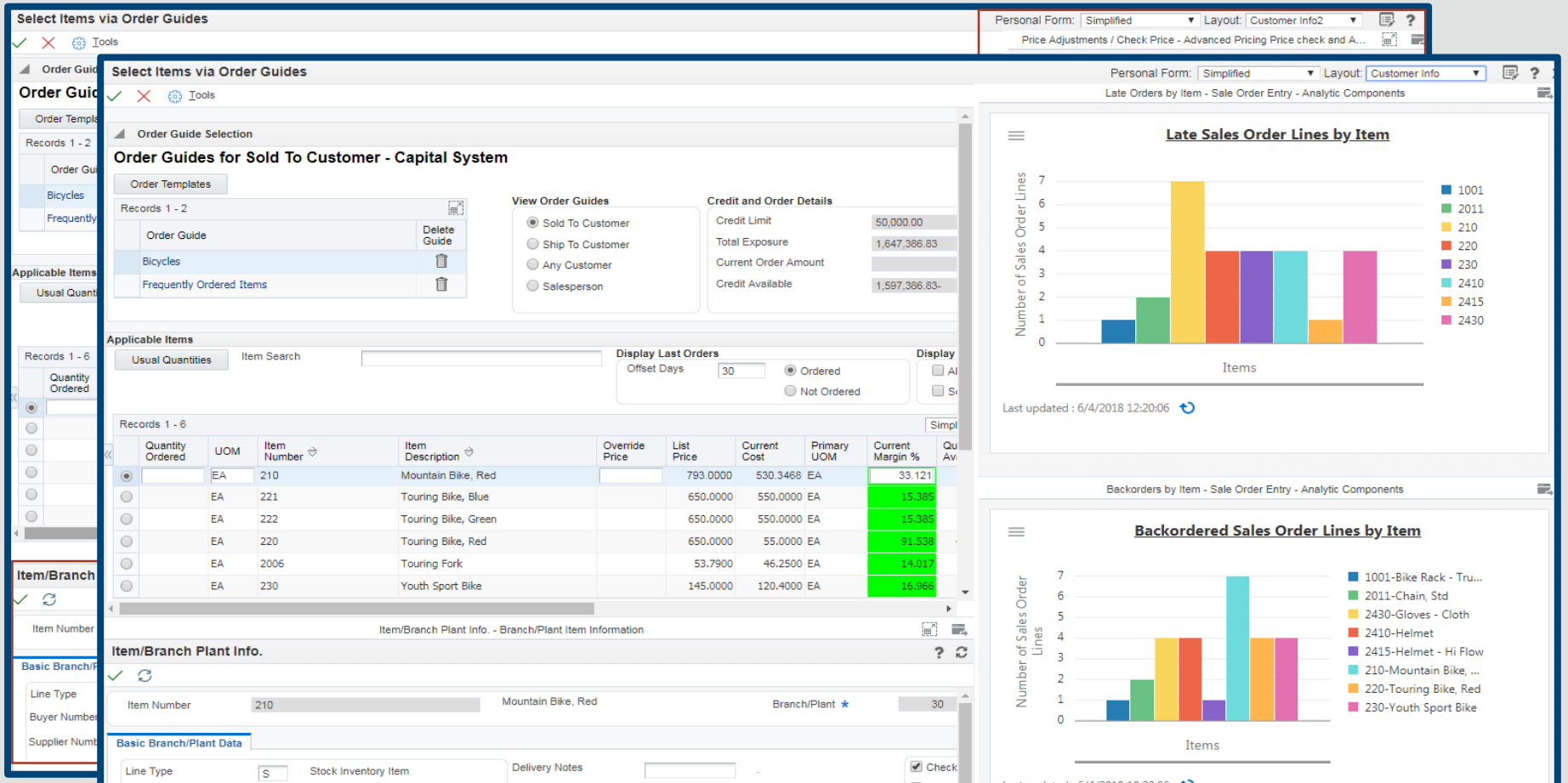

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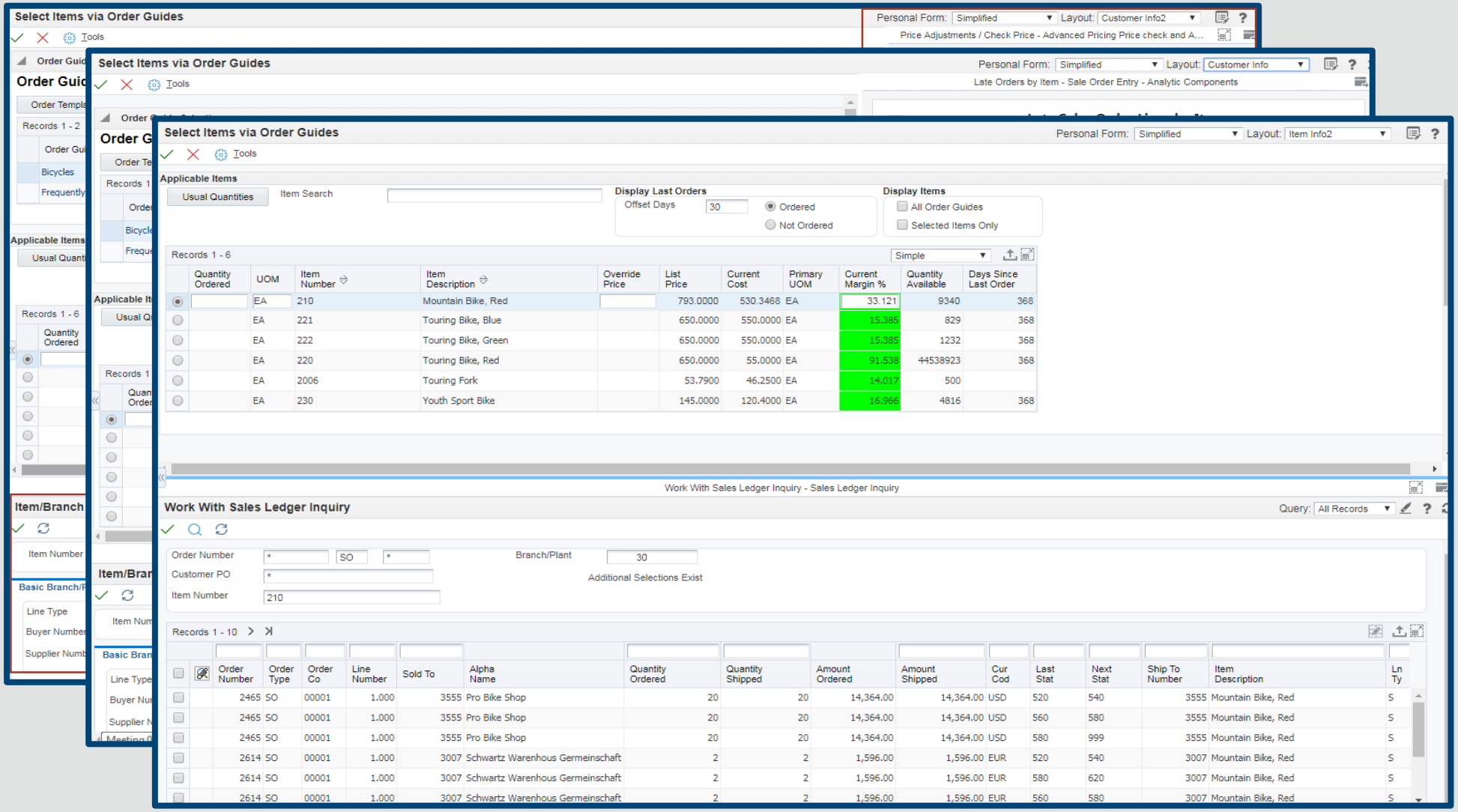

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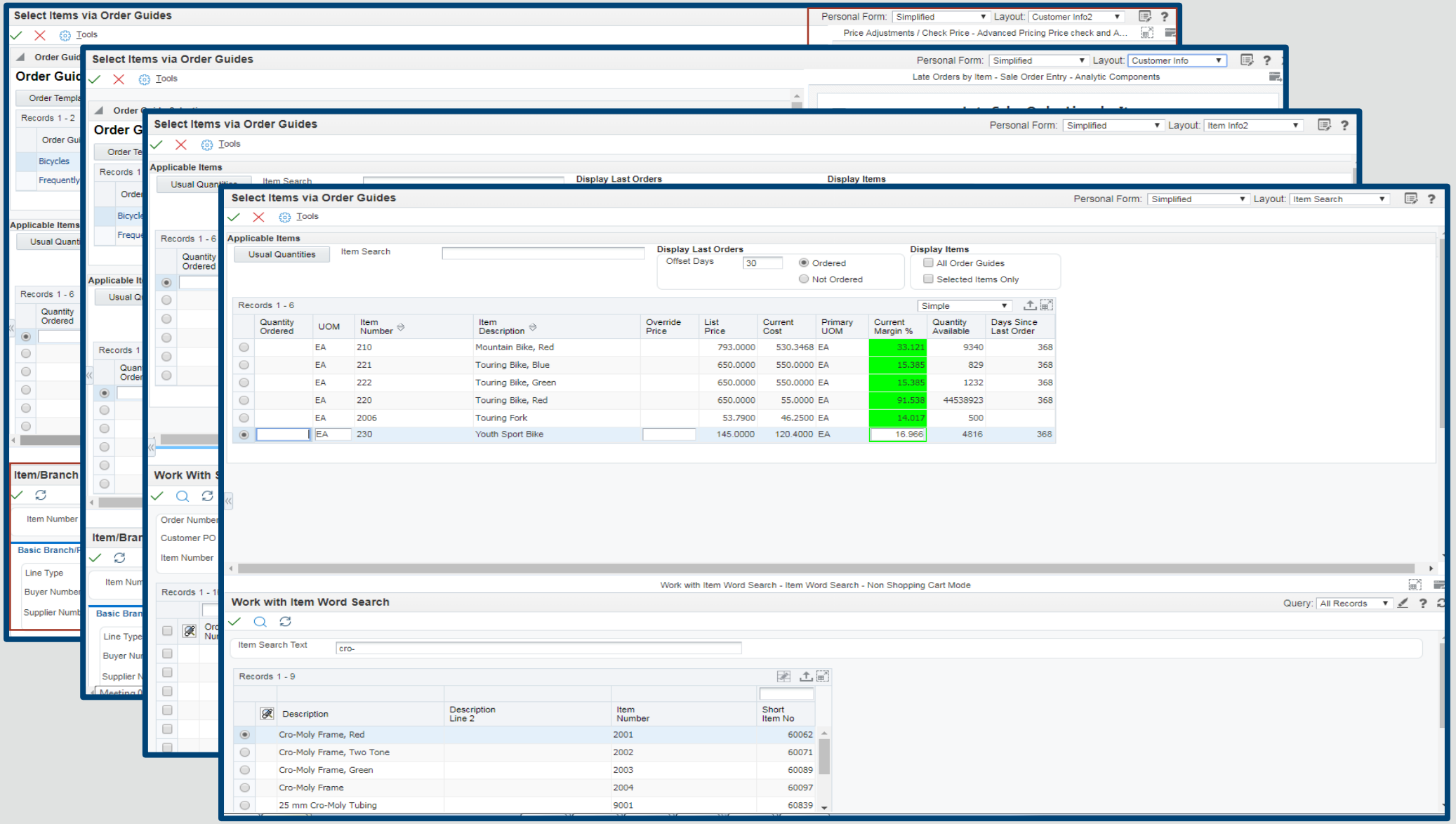

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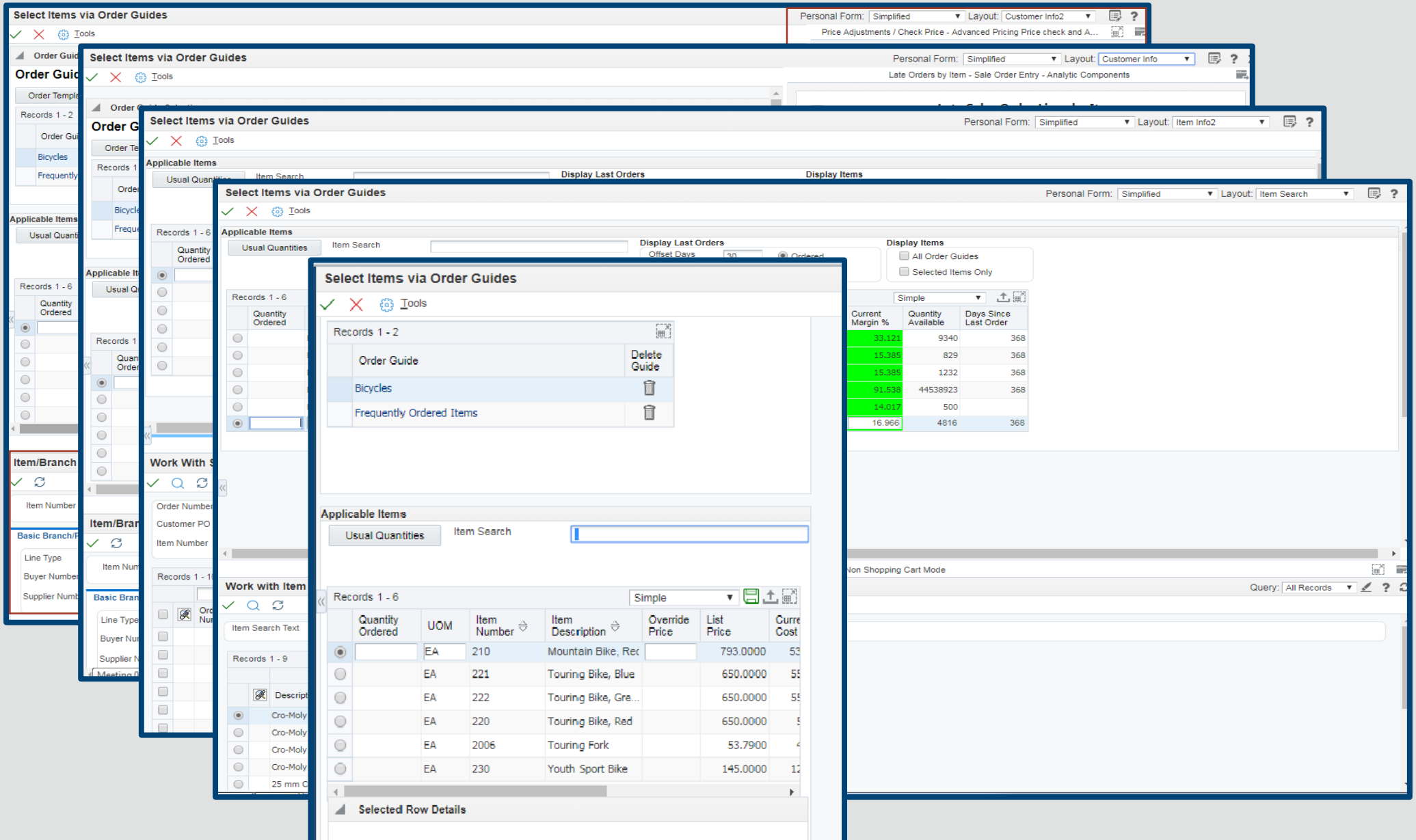
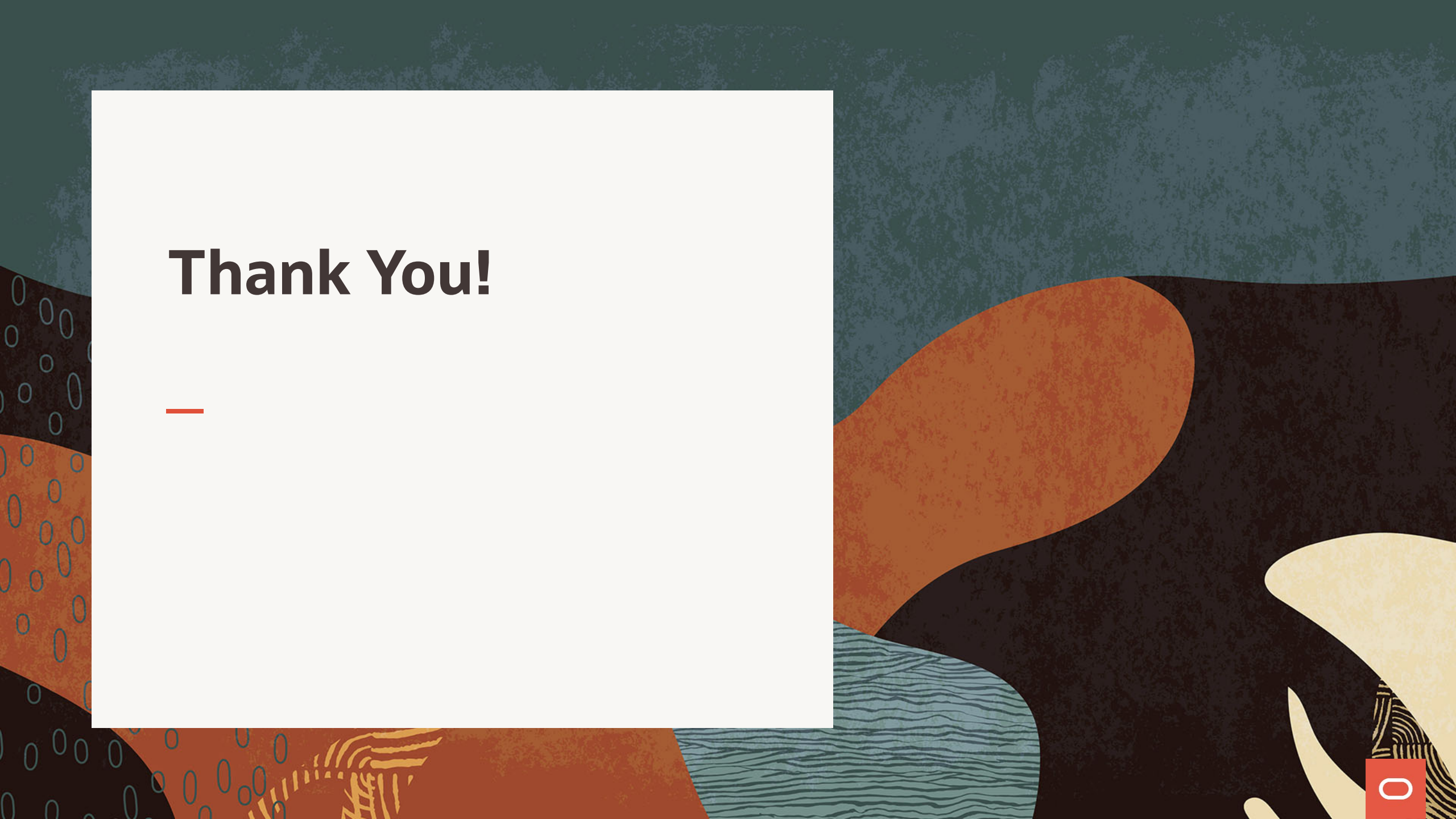
Thank You!