

Customer Order Transfer

The Customer Order Transfer option provides system support for transferring orders between sales and production companies. It simplifies the handling when the sales company receives orders from customers and a production company handles the manufacturing. The customer order transfer can then automatically transfer the customer orders that have been registered in the sales company and create a corresponding customer order in the production company.



Customer Order Transfer in MONITOR

The Customer Order Transfer is a procedure where you create a framework of how the transfer of orders between the sales company and production company should take place.

- Customer orders registered in the sales company are transferred to selected production companies.
- Different parts can be linked to different production companies.
- Delivery reporting takes place from the respective production company. Delivery notes can be created that have the sales company as sender.
- Invoice bases are created and they are then transferred to the sales company. The sales company will in its turn invoice the end customer.
- There are settings to determine how the price, terms of payment, order number, delivery times, etc., should be managed.

Principles

The items 1–5 below are events that are handled manually.

1. Registration of customer order from end customer in the sales company.
2. Delivery reporting orders in the production company and delivery to end customer.
3. Printing comprehensive invoice (for example once per week) to the sales company. For example with EDI invoice.
4. Registration of supplier order from the production company in the sales company. For example with Import of EDI invoice.
5. Printing invoice to end customer in the sales company.

A and B symbolizes the automatic transfer of customer order by using the MONITOR Customer Order Transfer.

- A. Transfers orders from the sales company's main order to the production companies. Transfers new, modified and deleted orders. Distributes orders to different production companies, default according to the supplier link on the part. This can be changed per order row.
- B. Transfers deliveries from the production company to the sales company's main order. The partial deliveries of the production company update the sales company's main order with order row information and the status "Partial delivery made" and "Final delivery made" as usual. Invoice basis will be created.

Settings

To determine the prerequisites for the Customer Order Transfer you configure different settings in the procedure. You find this procedure in the Sales module and it consists of three tabs: Manufacturing company, Sales company and Transfer profiles. In the Transfer profiles tab you can for example determine that the order number should be the same as on the original order or that number should be loaded from the production company's order number series. Other topics that can be determined by settings in this procedure are customer code, price, currency and delivery period.