

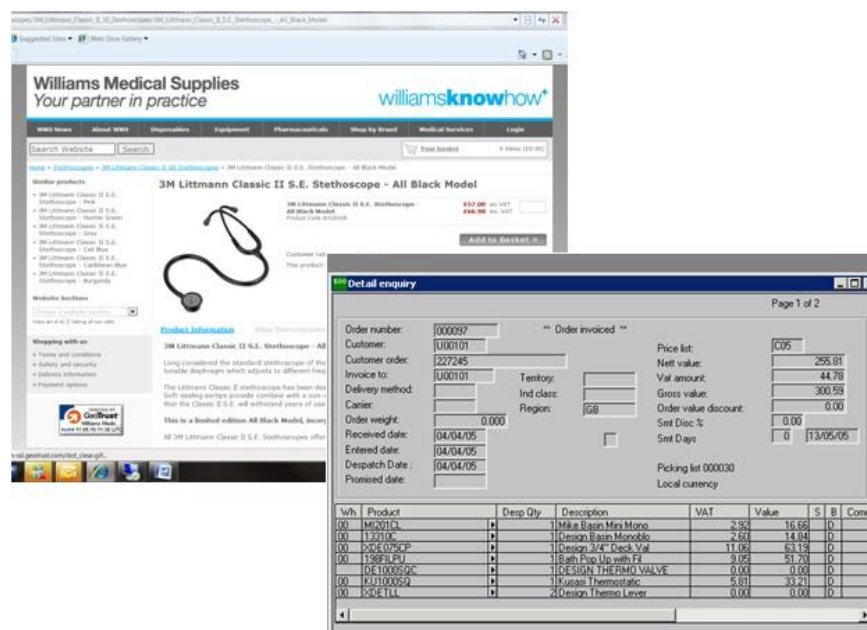
Sage Line 500 / Sage 1000 Sales Order Processing

Order Interface

Ever increasing numbers of companies are doing business over the web or electronically. In order to keep web shop creation processes as simple as possible, many organisations have developed web order applications independently to their back office system. Often the web shop is successful and 10's, if not 100's, if not 1000's of web shop orders are then to be processed manually.

The Web/XML Sales Order Interface module has been designed to automatically process web shop orders, for both *Business to Business* and *Business to Consumer* sales environments.

- Fully automated; no user tasks to perform to input orders.
- Auto search for web orders to process.
- Validation.
- Errors reported to a database table and order held in an error directory.
- Auto customer create 'on-the-fly' if order is for a new customer.
- Telesales matrix pricing, special offers, orders types and repetitive route scheduling supported.



Available features

Full Automation

No user activity is required to create the sales orders in to Line 500 / Sage 1000. Background processes monitor pre-defined directories on the Sage server at pre-defined intervals to check if new web shop orders have been created. If orders are found the order files are 'collected', processed and then placed in either a save or error directory depending on the result of validations whilst processing the file.

Validation

A number of checks are made to ensure a valid sales order is being created in the Line 500 / Sage 1000 system from the values in the file to be imported. If a valid order cannot be created, the web shop order file is placed in an error directory on the Sage server and an entry is made in an error table in the Sage database.

New customer create on-the-fly

In a *business to consumer* (B2C) environment, anyone can place an order. If the customer has traded with you before and their account number can be established, the order is placed on the existing account. If the customer has not traded with you before a customer account can be created on-the fly, using values held in a template customer record, allowing the sales order to be processed without having to wait for the customer account to be created manually.

Addresses

For maximum control in a *business to business* environment, the system can ensure items ordered are only delivered to existing delivery addresses. For more flexibility, an order specific delivery address may be passed to Line 500 / Sage 1000.

Bundle Processing

A growing number of products are now offered with different variations or features and options based on a parent item code. Web shop designs often allow these options or variations. If the bundles feature of Line 500 / Sage 1000 is enabled for the internal processing of such items, there is potential conflict as a web order which is already 'unbundled' is processed again trying to expand the bundle record. Needless to say, the web order interface module manages this situation.

Multi Company

The automation process can be configured for multiple searches in separate directories on the Sage server to process web shop orders for multiple Sage companies.

Discount Rounding

Web shop orders will be processed with values calculated in the web shop. Due to the way different systems round the results of calculations, there is potential for a different calculation in Line 500. Should such a difference occur, the web order interface module allows either the list, nett or discount value to be adjusted.

Sales Order Margin Check

As the orders are processed an order margin check can be made to help ensure only orders with valid sales values are processed.

Warehouse Codes

When an order is placed in the web shop it is unlikely that the warehouse from which the items will be despatched will have been determined. A system key can hold a valid, prioritised list of warehouse codes to use. Alternatively a specific warehouse code can be used on each detail line.

Back Order or Allocate

Allocating stock to orders can be a complex and / or a critical business decision process. Some organisations prefer not to let web orders consume current stocks without review. Therefore the system can be configured to allow allocation on processing or for orders to be set to back order and the release stopped orders option used to control the allocations.

Credit Checking

Orders created are reviewed against the customer credit limit and are created with the appropriate status depending on the order exceeding the credit limit.

Sales Order Prices

These may be passed from the webshop via the XML file to ensure the webshop price matches the sales order price or if no price is passed in the file we can look up the Line 500 / Sage 1000 price including any discounts, price lists, Telesales Matrix prices and Telesales Free Product Special Offers that exist for the customer.

Sales order creation

Sage's Line 500/Sage 1000 development environment tools are used to create the basic sales order header and detail information using the essential elements of the order creation process.

The sales order header is created as follows:

Sales order number

Created using a reference from the web shop order or uses the next sequential sales order number.

Alpha Code

Populated with a value from the web shop order or left blank as per standard SOP.

Customer Account Number (Delivery Account)

Populated with a value from the web shop order. If this value is not given, this indicates a new customer.

Address details default to the details on the customer file or the following fields can be over-ridden by values from the web shop order:

Account, Name, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Postcode.

Invoice Customer

Lookup from customer file based on delivery account. Leave delivery account and invoice account blank to indicate a new customer. Delivery account code used for new customer creation.

Address fields available for new customer:

Account, Name, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Postcode.

Statement Customer

Populated from the Line 500 customer file if an existing customer, populated with delivery account if new customer.

Date Entered, Date Received, Date Required, Pricing Date

Defaults to date processed in Sage or can be over-ridden with a value from the web order file.

Customer Order Number

Populated with a value from the web shop order.

Territory

Defaults to value in customer file or can be over-ridden with a value from the web order file.

Class

Defaults to value in customer file or can be over-ridden with a value from the web order file.

Region

Defaults to value in customer file or can be over-ridden with a value from the web order file.

Customer Discount Code

Defaults to value in customer file or can be over-ridden with a value from the web order file. Validation to check discount code passed in web order file is the same as the value in the customer file.

Order Status

Sales orders will be created with one of the following order status:

- 2 - If the customer is above their credit limit.
- 3 - If the customer is above their credit limit and the order is a backorder.
- 4 - If there is not enough stock to fully allocate or configured to not allocate.
- 5 - When all required stock has been allocated.

Can be configured to not allocate stock at order creation therefore order status 4

Hold Indicator

Populated with a value from the web order file.

Price List

Defaults from customer file but can be over-ridden by value in web order file. Populated with a value from the web shop order or from the Line 500 customer record - However system is designed to use a value sent from the web shop order.

Transaction Analysis 1, 2, 3

Defaults to value in customer file or can be over-ridden with a value from the web order file.

Delivery Method, Carrier Code, Responsibility, Delivery Reason

Defaults to data processed in Sage or can be over-ridden with a value from the web order file.

Shipper Code 1, 2, 3

Populated with a value from the web shop order.

Appearance

Populated with a value from the web shop order.

Shipping Text

Populated with a value from the web shop order. If Telesales route scheduling is enabled, an actual route code can be imported here.

Spare Field

Populated with a value from the web shop order.

The sales order detail is created as follows:

Line Type

Product, service and comment lines are automatically populated by the line type indicated in the web order file. Bundle line indicators are looked up from the stock file.

Warehouse Code

The warehouse code to be used for the item can be default from a system key, VTDEFWHS or populated with a value from the web order file.

Product Code

Populated with a value from the web shop order.

Short Description

Defaults to the value in the stock file or can be over-ridden by a value in the web order file.

Unit of Sale

Defaults to the value in the stock file or can be over-ridden by a value in the web order file.

Long Description

Defaults to the value in the stock file or can be over-ridden by a value in the web order file.

Product Group A, B, C, D, E, F

Default form stock file Populated with a value from the web shop order.

List Price, Nett Price

Populated with a value from the web shop order.

Discount Percentage

Calculated. If a value has been passed from the web order file, this compared to the calculated value and if different; a) the passed value can be over-ridden by the calculated value or b) the list price can be adjusted or c) the nett price can be adjusted.

Date Required

Populated with a value from the web shop order.

Vehicle

Populated with a value from the web shop order.

Spare

Populated with a value from the web shop order.

Transaction Analysis 1, 2, 3

Copied from the transaction analysis order header fields or over-ridden with a value from the web shop order.

Packaging

Populated with a value from the web shop order.

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