

HOW DO I KNOW WHICH ORDER ENTRY METHOD TO USE?

Lakeshore has several ways to enter an order. Why so many? Some are designed to make entering orders easier for a specific type of order (wearables order, fulfillment order) while others are targeted to specific order entry personnel (salesman, customer service). This discussion will describe the purpose and target "audience" of each method.

Update order file/Update Master Order

When you request either of these functions and click on the "New" icon to add a new order, you will get the "full" order entry.

Advantages

- Screens are the same as the ones you will use if you change or list an order after it is added.
- Almost all information about the order can be accessed.
- Will work for any type of order. For example, this is the only method you can use to enter an order for stock.
- If you have a customer order that requires one decorator and one blank goods vendor, you can enter information for both on a single order using the "Decorate and ship" type of order. Some users prefer the simplicity of a single order as opposed to the master order generated by the wearables order described below.

Disadvantages

- Overkill for entering many simple orders
- May be confusing to those who do not enter orders on a regular basis
- Longer, more screens to go through.
- The "Decorate and ship" order cannot be used for orders requiring multiple blank goods vendor or where the blank goods will come from inventory.

If you frequently need to use multiple blank goods vendors, it would probably be best to do all of these types of orders the same way, as master orders entered through the "wearables order" format.

When to use this method

- If you are entering one of the following types of orders:
 - Order for stock
 - Order for consigned goods
 - Decorate for stock
 - Decorate and ship
- You are repeating an order or master order.
- You need access to a field that is not on one of the specialized formats
- Preference - If you update orders on a regular basis, you may prefer to use the same format all the time to both enter and change orders.

Wearables order

This order is designed specifically for entering orders for items that will be decorated when you will have an outside decorator and will be buying the blank goods from one or more other vendors. It will generate one order for the decorator and one order for each blank goods vendor, all linked by a single master order number.

Advantages

- Handles orders that require multiple blank goods vendors
- Easily formats information on quantity/size combinations
- Easy to enter imprint information for each line item.
- Roll blank goods quantities up to quantity on decoration order.
- Calculates selling price on wearable items using target gross profit percentage based on decoration cost plus the cost of the blank goods

Disadvantages

- Does not work well for other types of orders such as traditional drop ship orders
- Blank goods cannot come from inventory
- Not appropriate for suppliers

When to use this method

- Use to enter wearable orders, especially those requiring multiple blank goods vendors.

Salesman order

This order is designed to look like a paper order form. This format is usually easier for sales associates and for others who may not enter orders on a regular basis to use to enter orders.

Advantages

- Easy to understand because it looks like a paper form.
- Most information entered on a single screen; exceptions and overrides are easily changed by clicking on a link
- Still able to enter orders for multiple vendors in the same master order.
- Can review or change orders in this format as well as add.

Disadvantages

- Cannot be used for the following types of orders:
 - Order for stock
 - Order for consigned goods
 - Decorate for stock
- Can be used to enter a fulfillment order but you cannot control allocated and backorder fields
- Not all fields are available

When to use this method

- You are entering drop ship or decorate and ship orders.

- You do not enter orders on a regular basis.
- Preference - You like the idea of seeing the order all on one screen.

Short order

This is a one-screen order where you can limit the number of fields shown on the screen. This is well suited to routine orders where you can default most of the information. It is particularly well suited to entering fulfillment orders.

Advantages

- All the information on one screen
- You can eliminate fields you don't need; this is set up under the Order Processing system options
- Excellent for entering routine fulfillment orders.

Disadvantages

- You indicate a specific number of lines on the system options; if you have an order with more lines, you will have to add them to the order once the order is generated
- If you exit before the order is generated, you lose everything you have entered on that screen.
- When order is generated, the standard order overview is shown. Any changes are made through the "full" order entry format.
- Does not handle specialized types of items such as bill of materials or separate color/size screen.

When to use this method

- When you have a situation such as fulfillment for a program where only a limited number of fields and line items are required and speed is essential.

Quick order

This is a stripped down version of the "full" order entry. All orders are entered as a master order. It will generate a separate order for each combination of vendor and process group.

Advantages

- You can suppress fields that are not needed (uses the same system options as the short order).
- Easy-to-use format
- Excellent for customer service to use for standard order entry.
- Allows all kinds of items including bill of materials and separate color/size screen.
- Can be used for fulfillment by enter 999999 as the vendor.
- Allows up to 999 line items on the order so it works for any size order.
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Disadvantages

- Format can only be used for entering new orders, not for changes later

- Cannot be used for the following types of orders:
 - Order for stock
 - Order for consigned goods
 - Decorate for stock
 - Decorate and ship

When to use this method

- Use when you need a flexible but simple way to enter master orders
- Use for simple order entry when you also require use of special types of items such as bill of materials

Other ways to generate orders

There are a few other ways that orders can be generated:

- You can generate a new order from a quote.
- You can repeat an existing order from the "Display Orders by Customer" and similar screens.
- You can generate multiple orders for stock based on availability from the "Generate orders for inventory stock" function on the "Add orders" menu.
- (Suppliers only) You can generate orders for non-stock merchandise from the "Generate orders for stock" on the Miscellaneous submenu in Work in Process.

All of these methods will display the overview for the newly generated order and will use the "full" order entry format for further updating.