

# JD Edwards EnterpriseOne Sales Order Management



## KEY FEATURES

- Enable customer-specific pricing, delivery instructions, and billing requirements
- Identify up-sell and cross-sell opportunities for sales personnel
- Check customer credit, delivery options, pricing options, and freight calculations from a single viewpoint
- View available inventory during order entry
- View order status at any stage in the fulfillment cycle
- Use mobile applications to facilitate the sales cycle
- Access UX One role-based pages for Customer Service Manager and Customer Service Representative

## KEY BENEFITS

- Fast, personalized service for your customers
- Integrated sales order management across your enterprise
- Do business the way your customers want to do business
- Reduce sales order entry and processing costs
- Increase revenues from every sales opportunity

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, calculate tax, 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, through the JD Edwards EnterpriseOne Customer Relationship Management family of products, or via electronic transactions. When using electronic transactions you can send the unique global location number for your customer instead of the full mailing address.

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. And,

because JD Edwards EnterpriseOne Sales Order Management is also integrated with JD Edwards EnterpriseOne Demand Scheduling Execution, 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.

Mobile applications facilitate using the system at the point of process, when and where your sales force needs to communicate with your customers. Mobile Enterprise applications that support the sales process include:

- Customer Order Overview for Tablet and Smartphone
- Inventory Availability for Tablet and Smartphone
- Product Price and Availability for Tablet and Smartphone
- Quote Review and Release for Tablet and Smartphone
- Sales Held Order Release for Tablet and Smartphone
- Sales Order Counts for Tablet and Smartphone
- Order Entry for Tablet
- Search Sales Order for Tablet and Smartphone
- Warehouse Availability for Tablet

Access to UX One role-based pages enables Customer Service Managers and Customer Service Representatives to easily access, review, and act upon important information, thereby streamlining the sales order process.

## 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
- Multi-Attribute items
- Product expiration, sell-by and best-by dates, and grades and potencies
- Pricing
- Messages and remarks
- Invoicing

The multi-tiered 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 configurator 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. To meet regulatory compliance, the country of origin can also be tracked at the inventory item level.

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

## Related Products

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

- JD Edwards EnterpriseOne Financial Management
- JD Edwards EnterpriseOne Procurement and Subcontract Management
- JD Edwards EnterpriseOne Advanced Pricing
- JD Edwards EnterpriseOne Agreement Management
- JD Edwards EnterpriseOne Apparel/Attribute Management
- JD Edwards EnterpriseOne Configurator
- JD Edwards EnterpriseOne Demand Scheduling Execution
- JD Edwards EnterpriseOne Fulfillment Management
- JD Edwards EnterpriseOne In-Memory Sales Advisor
- JD Edwards EnterpriseOne One View Reporting for Sales Order Management
- JD Edwards EnterpriseOne Manufacturing – Shop Floor
- JD Edwards EnterpriseOne Supply Chain Planning (SCP), including Order Promising, Production and Distribution Planning, and Production Scheduling
- JD Edwards EnterpriseOne Bulk Stock Inventory
- JD Edwards EnterpriseOne Inventory Management

- JD Edwards EnterpriseOne Transportation Management
- JD Edwards EnterpriseOne Warehouse Management
- JD Edwards EnterpriseOne Mobile Enterprise Applications



#### CONTACT US

For more information about JD Edwards EnterpriseOne, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.

Connect with us

 [blogs.oracle.com/oracle](http://blogs.oracle.com/oracle)

 [facebook.com/oracle](https://facebook.com/oracle)

 [twitter.com/oracle](https://twitter.com/oracle)

 [oracle.com](http://oracle.com)

#### Integrated Cloud Applications & Platform Services

Copyright © 2016, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0912

