Customer Order Transfer

Simplify Order Management between Sales Company & Production Company!

The Customer Order Transfer is a supplement in MONITOR which provides the system support to transfer orders between sales and production companies (in the MONITOR ERP system called manufacturing companies). The MONITOR Customer Order Transfer 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.

Why Use the 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.

Customer Order Transfer – 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. As a suggestion with EDI invoice.

4. Registration of supplier order from the production company in the sales company. As a suggestion with Import of EDI invoice.

5. Printing invoice to end customer in the sales company.

A. Transfer of Order

1. Order from Customer

Sales Company

5. Invoice to Customer   4. Invoice from Manuf.

B. Transfer of Delivery Reporting

3. Invoice to Sales

Manuf. Company

2. Delivery to Customer

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.

Customer Order Transfer – Settings

The Customer Order Transfer is a supplement to MONITOR that is used to manage transfers of customer orders between sales companies and production companies. You configure different settings in the Customer Order Transfer Settings procedure. These settings will then determine the prerequisites for the customer order transfer. You find this procedure under Sales | Order 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.