

APEX Manual Order Entry - RAG-Compatible Guide

Create a Sales Order

- Step 1: Login to APEX. Dashboard appears after successful login.
- Step 2: Click the hamburger icon to access the 'Create Order' screen.
- Step 3: Fill in sales order header fields (e.g., Source Order Number, Order Date, Order Type, Customer ID).
- Step 4: Click 'Create' and confirm to auto-generate Order Number.
- Step 5: Click 'Add Row' to input line-level details like Item Number, Quantity, Store, Tax, etc.
- Step 6: Click 'Save' to store line-level data.
- Step 7: Open 'Payment Mode', click 'Add Row' and fill payment details (Method, Amount).
- Step 8: Click 'Book' and then 'OK' to finalize the order. Order is created and moves to Order Details screen.
- Step 9: Navigate to RF-Smart for Pick Confirm and Ship Confirm.

E-Com Exchange Order with Referenced Return

- Step 1: Login to APEX. Dashboard appears by default.
- Step 2: Enter the original Sales Order Number, tick 'Show Closed and Cancelled Lines', and search.
- Step 3: Open the order detail screen and select the relevant line.
- Step 4: Click 'Return'. Confirm return creation and select a Reason Code.
- Step 5: Click 'Submit'.
- Step 6: Go to RF-Smart to perform RMA Receiving and Putaway Receipt.
- Step 7: Once successful, status will reflect as 'Closed'.

E-Com Exchange Order with Unreferenced Return

- Step 1: Login to APEX and go to the 'Create Order' screen.
- Step 2: Create a RETURN type order and complete the order header and line details.
- Note: Apex converts positive tax values to negative automatically.
- Step 3: Add payment using 'ADYEN' method in the Payment Mode dialog.
- Step 4: Click 'Book' to finalize. Navigate to the Order Detail screen.
- Step 5: Use RF-Smart for RMA Receiving and Putaway Receipt.
- Status updates to 'Closed' after completion.

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Cancel Return Order

Step 1: Login and search for the Return Order.

Step 2: Click the order number to open details.

Step 3: Click 'Void'. Confirm cancellation. Order status updates to 'CANCELLED'.

Cancel Sales Order

Step 1: Login and search for the Sales Order.

Step 2: Click the order number to open details.

Step 3: Click 'Void'. Confirm cancellation. Order status updates to 'CANCELLED'.

Search for Sales Orders to be Shipped This Week

Step 1: Login to APEX. Go to the dashboard.

Step 2: Apply filters:

- Fulfilment Status = 'Awaiting Shipping'
- Date range using Date Wizard or manual input

Step 3: Click 'Search'. Results will appear based on criteria.

Search Sales Orders by Global/Region/Store

Step 1: Login and navigate to the dashboard.

Step 2: Apply filters:

Global: Fulfilment Status='Awaiting Shipping', Order Category='Sale', Show Orders From='Global'

Region: Fulfilment Status='Awaiting Shipping', Order Category='Sale', Show Orders From='Region'

Store: Fulfilment Status='Awaiting Shipping', Order Category='Sale', Show Orders From='Store'

Step 3: Click 'Search'.

Search for Closed/Cancelled Orders

Step 1: Login to the APEX dashboard.

Step 2: Apply filters:

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To view Closed Orders: Check 'Show Closed and Cancelled Lines', Fulfilment Status='Closed'

To view Cancelled Orders: Check 'Show Closed and Cancelled Lines', Fulfilment Status='Cancelled'

Step 3: Click 'Search'. Matching orders will appear.