1. Order Management Setup

•Define Order Management System Parameters

Order Management System Parameters are defaults and rules to ensure smooth and consistent Order-to-Cash processes.

// Navigate to Order Management. Select Setup, select System Parameters, then select Define.

A screenshot of a computer

Description automatically generated

// Query the System Parameters, select the parameter, and select OK.A screenshot of a computer

Description automatically generated// Path: Setup > System Parameters > Define

2. Customer Management [Customer Creation]

•Define and Maintain Customer Accounts and ContactsA screenshot of a computer

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// Select Create to Create a CustomerA screenshot of a computer

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// Path: Setup > Customers > Standard > Create

•Setup Customer Shipping and Billing Information

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•Manage Customer-Specific Pricing and Discounts

// Navigate to Order Management and select Price and AvailabilityA screenshot of a computer

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// Query a Customer by Customer # or nameA screenshot of a computer

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Description automatically generated

// Query an item to manage pricingA screenshot of a computer

Description automatically generated// Select Price and AvailabilityA screenshot of a computer

Description automatically generated

// Path: Order Management > Price and Availability

3. Sales Order Creation and Entry

•Create Sales Orders Manually or Import from External Systems

// Navigate to Orders, Returns, then select Order OrganizerA screenshot of a computer

Description automatically generated// Select New OrderA screenshot of a computer

Description automatically generated

// Select Book OrderA screenshot of a computer

Description automatically generated// Select NotifyA screenshot of a computer

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// Choose Responsibility, provide Message Text, then select SendA screenshot of a computer

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