

SYMIX ORDER ENTRY CHECK LIST



ORDER HEADER

(Customer > Customer Service > Order Maintenance) or (Ctrl-O)

Address Tab

- Customer correct? (distributor)
- Ship-to address correct c/w any shipping instructions?

General Tab

- Ship-via code correct?
- Status set to '**Planned**' if for 'Approval' ** OR ** if 'Released to Engineering' or 'Released to Production' is the status set to '**Ordered**'?
- Sls person (Rep) correct?
- End User Type (Division and account code) correct?

Amounts Tab

- Check to see if the (Estimated) 'Total Price' is correct? (if a Canadian order, the GST must be deducted from the 'Total Price' amount to get the PO sell price amount)

User Defined Tab

- Project Name correct?
- Project Coordinator correct?
- NAISC Code (formerly SIC) correct? (see conversion chart with new NAISC codes)
- PO Amount (total lot sell) correct?
- Dealer Mark-up (HCOM) correct?

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LINE MAINTENANCE

(Button – top right)

- All item numbers on order completely correct?
- Are all the 'old' mounting numbers converted correctly to the new numbers?
(see the *new part number conversion charts*)
 - ◆ ALL ceiling numbers, ---A2N240N0W, ---A2N241S2W – changed to the new '300...' numbers?
 - ◆ ALL pendant numbers have the separate pendant part number?
 - ◆ ALL endcaps, endplates, joints and corners changed to the correct numbers?
 - ◆ ALL 'WA' asymmetric wall brackets changed to the new numbers?
- Are all quantities correct?
- Are all the '**Due Dates**' correct? (equivalent to 'Request Date' in MaCola). Use the accelerator key in the 'Quick' menu at top of screen (if necessary).
- INS-DOC (installation documents) line item on order?
- PROJ-DOC (project specific documents) line item on order?
- Part #5002412 (a/c release keys) line item on order (if applicable)?
- All light structure orders must have 2 additional items in the order – 1) an item with a part number same as project number and 2) an item with a part number same as project number with an 'M' at the end. Both should be qty. of 1 and \$0.00. Are these items on the order?
- Make sure there is not an 'H666666' part number on the order! (If the H666666 number is greater than \$1.00 in MaCola, the value must be added to the first line item in the order (divided by the quantity of line 1 etc.)).
- Make sure the lines are set to the same status as the header. Go to the 'Line Detail' button (bottom left of screen). Status should be '**Planned**' if for approval **OR** '**Ordered**' if 'Released to Engineering or Production'.

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COMMISSION DISTRIBUTIONS

(Activities > Commissions > Commission Distributions) or (Ctrl-C)

- HCOMM orders should only have 1 commission distribution line item if there is no commission splits.
- Light structure commissions need to be distributed as they have been in MaCola.
- Is the line number correct?
- Is the Rep number correct?
- Is the 'Revenue %' correct? (i.e. s/b 15% for a book price light structure, 100% for any order with HCOMM).
- Is the 'Commission %' correct (should be 100% if only 1 commission distribution, should add up to 100% if there is a commission split between reps).



FUNNEL ORDER TO PROJECT STATUS

('Project Status' Button @ Order Header) or ('P/S' Button @ Line Maintenance) or (Ctrl+1)

- Is order funneled to the Order Status database? (click on Project Status button on order header or the 'P/S' button on the Line Maintenance screen.
- Are all the dates and the status correct? (i.e. 'approval drawings out' or 'released to engineering')

Quick-View Basic Order Checklist

- ▶▶ Order header
- ▶▶ Order line maintenance
- ▶▶ Line due dates and status
- ▶▶ Commission distributions
- ▶▶ 'Funnel' into project status database + update status