



All processes are optional and can be removed or reordered.

Most processes include decision making or additional options, conditionality not shown to simplify documentation.

"UDF" = User defined fields, options, and multiple data types dynamically configured for each client. All documents/labels tailored to client requirements.

* denotes optional additional extra.

Orders entered by internal team (SO / PO)

Entry of Sales Orders

Import selected formats

Attach documents/images to orders as required

API entry of orders

Integration with external systems*

Analyze orders from "Sales dashboard"

SO can be 'projections' to help with production planning processes.
PO are used in projections.

PO & SO both have approval processes.

Sales Orders entered by customers (Customer portal*)

Register customer portal user

Internal team registers unlimited users
For each customer,

Email supplier user credentials

Welcome email contains users
Initial credentials, sign in URL,
Instructions to change their password.

Approval

Order approved or
Rejected

Customer uses portal

Client branded sign in page
Enter new orders with any required UDF
Modify existing orders
Cancel orders
View current / historical orders
(Includes My Profile self user management)

Communication, documents

Email alerts for orders

Order approval alerts can be sent to customers, specifying order confirmation or rejection, and can include user defined documentation.

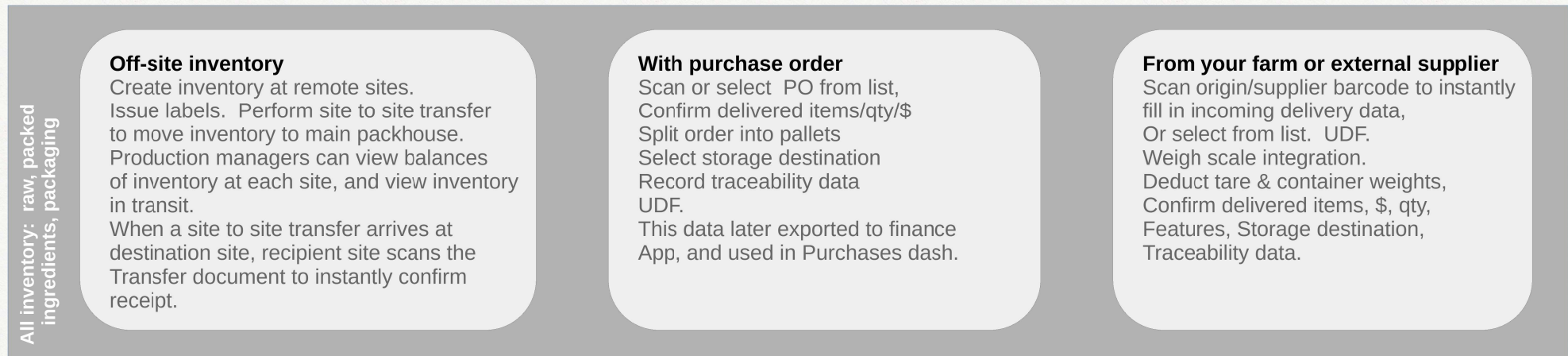
New orders generate alerts for selected production staff, and can also be sent to customers (user defined documents are sent in PDF format)

Modified orders are sent to selected production staff, a confirmation can also be sent to customers.

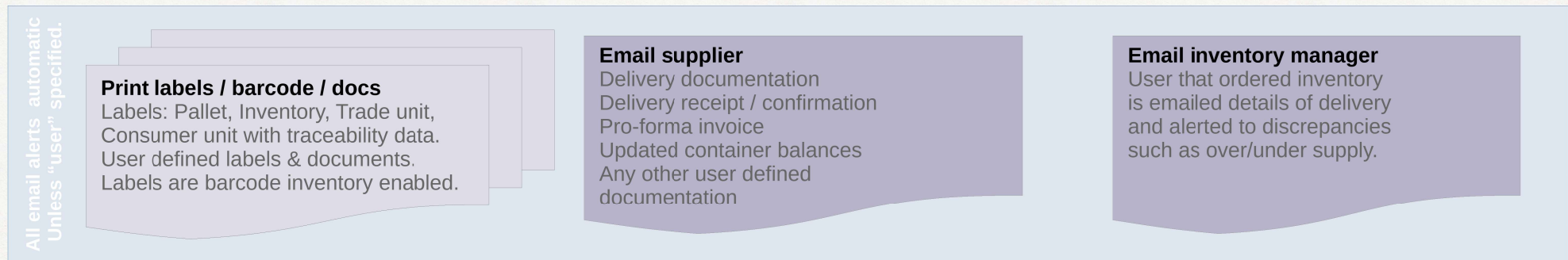
Order cancellations alerts are sent to selected production staff.

Additional alerts sent during dispatch (see Logistics).

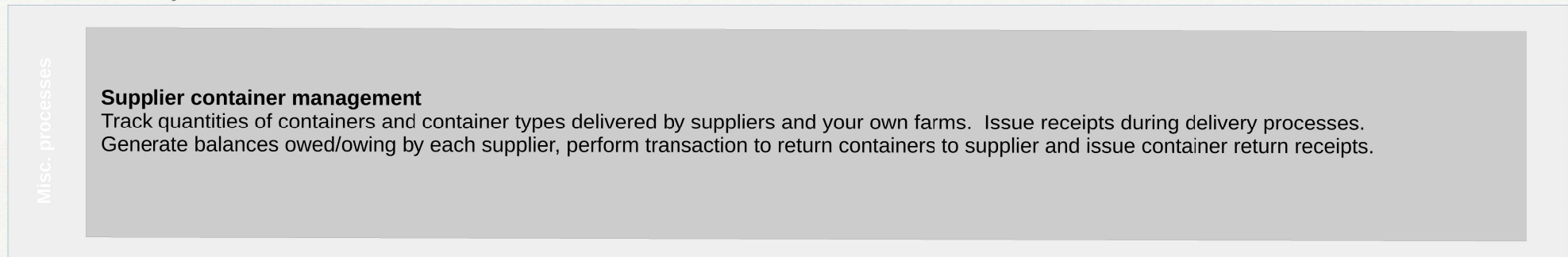
Inventory delivery



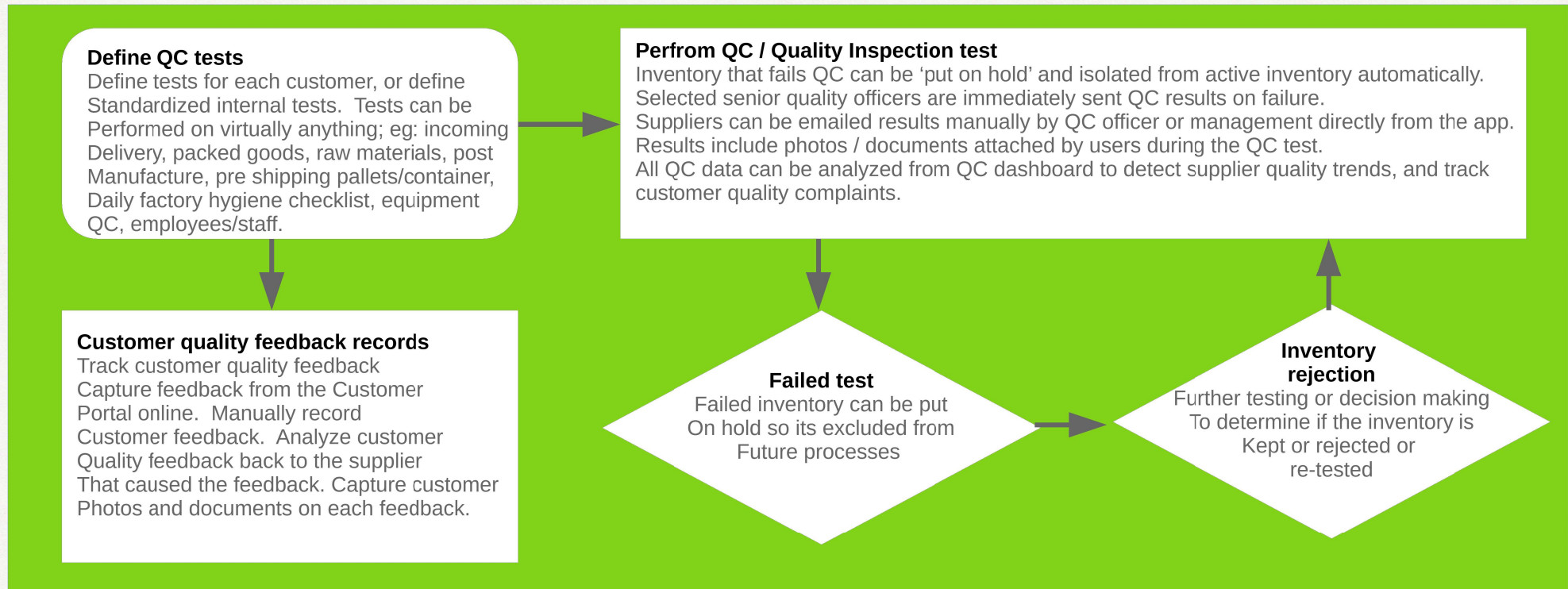
Communication, documents, labels, barcode



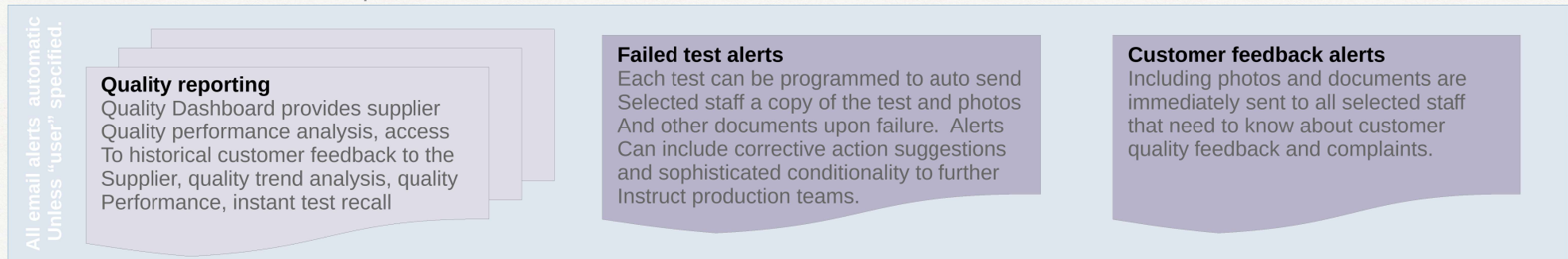
Other inventory



QC can be performed at any time on any object.

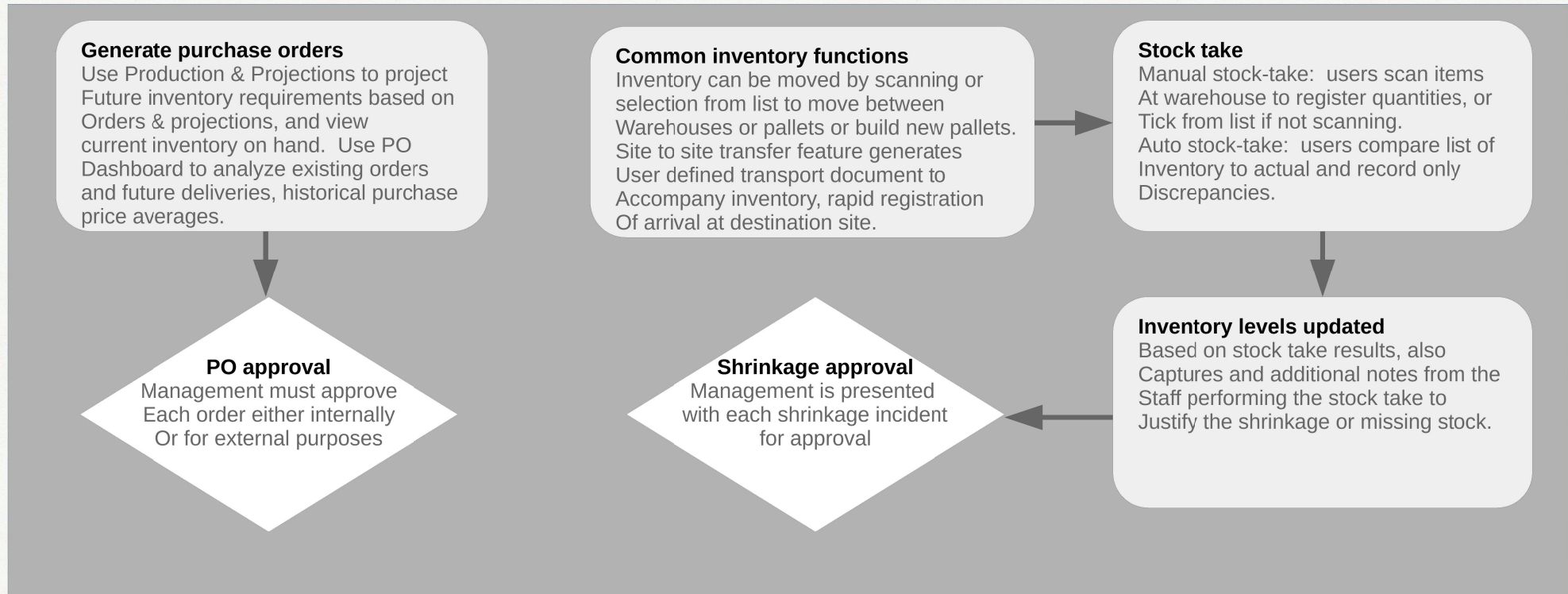


Communication, documents, reports





Physical inventory management



Communication, reports

