ADVANTEC
INFORMATION SYSTEMS, LLC

Brokered Order Entry

Supports Brokered Sales Business Model

Adjustments to UA 6.5's OE and PO Modules allow quotes and orders to be placed and then a purchase order to be issued for those requirements

➡ **Select from Vendor Stock as well as Inventory**
➡ **Vendor Stock is updated by SQL processing to pull data from external vendor supplied files**
➡ **Inventory files are cross-correlated with Vendor part number**
➡ **Allows identification of buy/stock, vendor, vendor part number, and cost by line item**
➡ **Automatically make all POs and cross reference sales orders and associated POs by vendor**
➡ **Automatically update Material Supplier records with sources and prices**
➡ **Display associated sales order, posted and received status on PO Status Display**
➡ **Provide similar SO Status Display for edit selection and reprint**
➡ **Display Serial Number information on Sales Orders and Invoices for Serialized Inventory**
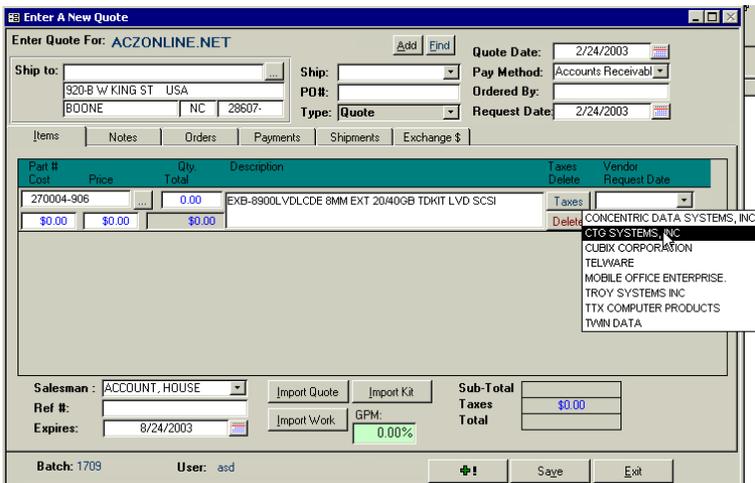
➡ **Select the vendor for each order item from a convenient drop-down list box**
➡ **Supports multiple aliases of the same part from any number of vendors**
➡ **Can cross-reference various vendor aliases with a single UA part number**
➡ **Assigns vendor name from drop-down list, records vendor alias and assigns UA part number**
➡ **GPM calculates and displays Gross Profit Margin as Order/Quotes are prepared**
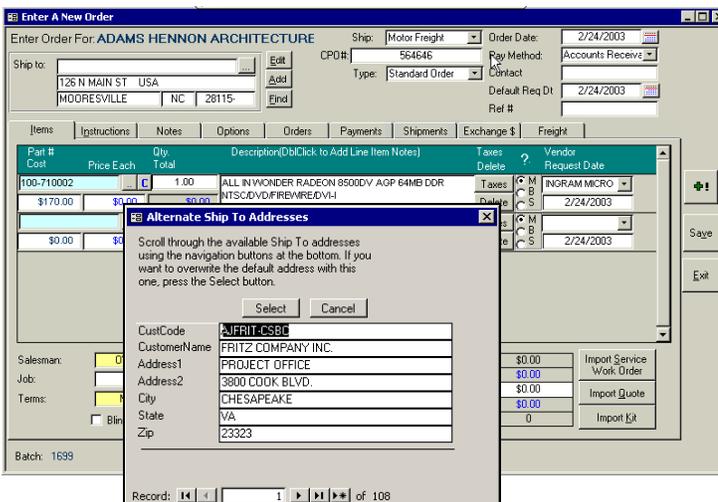
Create a New Order
➡ **Automatically updates Purchase Requirements Task List**
➡ **Produce Blind Ship Orders so that the customer's client receives the package with customer name and address on the packing slip, while billing is received by the original customer**
➡ **Displays "Buy" status in Order Fulfillment**
➡ **Dynamically add alternate shipping addresses**
➡ **Shipping enhancements allow for carrier selection and for carton count**
➡ **"C" button allows selection of parts by customer part number (alias)**

- ➡ **Edit Quotes and Edit Orders forms contain fully editable details for order line items**
- ➡ **Adds Company logo to Quotes Reports**
- ➡ **Displays Gross Profit Margin as changes are made to Orders and Quotes**
- ➡ **Incorporates the editing of Vendor ID, Vendor Part Number, Cost, and other line item details**
- ➡ **Edit Orders form allows edits in billing and shipping information**

- ➡ **PO Status Display lists all purchase orders not yet archived**
- ➡ **Additional fields added to extend PO Status Display form functionality: Received, Cost, Billed, Shipped, and Order Number**
- ➡ **Received Yes/No column displays those items that have been completely received**
- ➡ **Click Edit to check on Partial Shipments**

- ➡ **New Sales Order Status form displays all sales orders not yet archived**
- ➡ **Double-clicking Order Number displays Edit Orders form**
- ➡ **Shipped Yes/No column specifies whether the order has been completely shipped or not**

- ➡ **Maintain listing of vendor stock details:**
  - o **Vendor Name**
  - o **Quantity**
  - o **Cost**
  - o **Location**
  - o **Vendor part number (alias)**
  - o **Date that the listing was last updated**

- ➡ **Add new materials, if needed, directly from the orders screen with this Material Quick Add form**
- ➡ **Specify whether the components are manufactured, purchased, or both**
- ➡ **Specify whether the material is normally made for stock or made to order**

Purchase Order
- ➡ **Drop Shipment tab allows selecting alternative addresses Orders, Invoices, Customers file**
- ➡ **Update billing and shipping address**
- ➡ **Purchase Orders automatically updates Material Supplier records**