SALES ORDERS: ENTRY TO RELEASE

ADVANTUS

Entry

Emailed Purchase Orders → Customer has an upload template? — **Yes** → Drop Folder

EDI Purchase Orders (850), Shopify (Web) Orders, Customer's portal integration

Web Services

Customer has an upload template? — **No** → UI Sales Order

Drop Folder / EDI / Shopify → **Web Services** → Automated Sales Order ← **Script (RESTlet)** ← Customer's portal integration

Approval

UI Sales Order → User setup for auto-approval?
- **Yes** → Approved by system (*on save*)
- **No** → Approve Sales Order

Automated Sales Order → Customer setup for auto-approval?
- **No** → Approve Sales Order
- **Yes** → Approved by system (*30 mins*)

Allocation & Validation

Approved by system → Inventory allocates via commit schedules (*15 mins*) → System updates allocation status (*30 mins*) → Customer setup as Order in Full*?
- **Yes** → Allocation status is Full?
  - **No** → System runs validation & updates validation status
  - **Yes** → (down)
- **No** → Allocation status is Full or Partial?
  - **Yes** → (to Validation Status)
  - **No** → (back to Inventory allocates)

Validation Status = Passed?
- **No** → Review and resolve failed validation → System runs validation & updates validation status (*30 mins*)
- **Yes** → (down)

System runs validation & updates validation status (*30 mins*) → (Approved by system, 30 mins)

Release

Hold note or hold reason on sales order?
- **Yes** → Review and resolve hold reason → Review and release sales order
- **No** → Customer setup for auto-release?
  - **Yes** → System will release order (*30 mins*)
  - **No** → Review and release sales order

Post-fulfillment

System will release order → System changes order release status to Hold & allocation status to Pending (*30 mins*)

Review and release sales order → Is order completly fulfilled?
- **Yes** → Status = Billed or Closed
- **No** → Customer setup to close unfulfilled lines?
  - **No** → System changes order release status to Hold & allocation status to Pending (*30 mins*)
  - **Yes** → System closes unfulfilled lines (*30 mins*)

Legend

- **Document** (green)
- **Decision** (yellow diamond)
- **Manual Process** (pink trapezoid)
- **Non-System Process** (orange)
- **System Process** (gray)
- **History** (blue cylinder)

★ Order Line Fill & Release Rule