

Direct Order Overview

A Direct sales order is used when the products being sold are shipped straight from your supplier to your customer.

The products do not come into your yard, store or warehouse and therefore do not affect your available stock information.

In this course, we will review the Direct Order Sales processing cycle.

We will explore the steps required to create a Direct Order Sale, modify the automatically generated Purchase Order and see how to convert a Stock Purchase Order.

The processing cycle for Direct Order Sales can be summarized in a few steps.

First, the 'Sale Type' is set to 'Direct' and the details of the order entered.

A back-to-back purchase order is generated.

The Sales Order status is 'Waiting for Supp. Inv.'.

When approval is required, the PO status is 'Saved'.

Once approved, the PO status changes to 'Waiting for Invoicing'.

The PO is sent to the Supplier.

The Supplier delivers the products to the Customer's delivery address as stated on the PO.

Upon receipt of the Supplier's invoice it is entered into Accounts Payable.

The PO status changes to 'Invoiced' and the Direct order to 'Invoicing'.

Having received the Supplier's invoice usually indicates the products have been received by the customer.

The customer is invoiced changing the order status to 'Invoiced' and completing the sales cycle.

There are very few differences in the entries for a Direct order versus other sale types.

On the General tab the 'Sale type' is set to 'Direct'.

Products are added to the order as normal.

Available Stock is not checked and stock warnings will not display if there is not sufficient available stock for Direct orders.

Each product line is flagged as a 'Direct'.

Opening the properties for the selected line, the 'Available stock', 'Branch', Refresh and Stock Info icons are not shown.

Direct orders have an option to copy a Text Line onto the Purchase Order.

This is useful for providing your Supplier with additional instructions.

Click 'Text Line'. Enter the desired message. Below the text box select to 'Copy line to purchase order'.

Press 'OK' and the line will appear as entered on the PO.

After pressing 'Complete' the Review window details indicate the 'Product', 'Qty to Order' and 'Supplier' that will be used on the PO.

The Supplier shown is the default set on the product. It is also the only supplier as noted by the '1 suppliers' in the 'Alternatives' column.

You can choose a different supplier by clicking on the ellipsis which opens the window to search for and select a supplier.

Press 'Continue' to finish the order.

From 'Find Documents', the sales order is shown with the 'Sale type' and 'Status'.

The status is 'Waiting for Supp. Inv.'.

When not set to be auto approved, the back-to-back Purchase Order is given a 'Saved' status.

The 'Order Type' indicates 'Direct' and the 'Our ref' column shows the sales order number that it originated from.

The PO is opened by double-clicking on it.

From the General tab, the 'View Sales Order' button allows you to open the sales document associated with this Direct PO.

The Lines tab shows the quantity, cost and text line from the order.

Any changes made to cost update the profit and margin of the sale.

The Notes tab shows information in the 'Internal notes' text box that was copied from the sales order.

After making any changes, click 'Approve Order' and follow the prompts.

The PO status changes to 'Waiting for Invoicing'.

The printed PO document shows the customer's address as the 'Delivery Address'.

It is possible to turn an existing 'Stock' PO into a 'Direct' PO.

From 'Find Documents', with the 'Look for' set to 'Purchase Orders' select the PO, right-click, and select 'Convert to Direct'.

A new 'Direct' Sales Order is opened.

All product lines from the PO are copied onto the order.

Select a customer for the Direct order.

After adding all information, 'Complete' the order.

The Purchase Order now displays a 'Direct' Status.

The 'Our ref' column shows the associated Sales Order number.

You should now be able to create a Direct Order Sale and track it throughout the processing cycle.

Turning a Stock PO into a Direct should also be a task you can easily accomplish.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Bldv. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore

Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298