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RAMCO AVIATION SOLUTION

VERSION 5.9

USER GUIDE

CUSTOMER ORDER MANAGEMENT HUB

ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco Aviation Solution.

This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based soft

HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the entire **Commercials Management** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the sub process **Customer Order Management Hub**.

Chapter 3 focuses on the sub process Bulk Processing of CO and Request.

Chapter 4 focuses on the sub process Processing Selected Request from Summary Multiline

The **Index** offers a quick reference to selected words used in the manual.

DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the "Create" business activity. Specific references (if any) to any other business activity such as "Modify" and "View" are given as "Note" at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references.

  Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution.

The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems' Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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INTRODUCTION

The **Customer Order Management Hub** has been primarily introduced for tracking and reviewing the order management cycle, right from setting up the Customer Request to the creation of the order, (Customer Order/Part Sale Order) up to the billing process.

This hub enables the user to review customer requests, quotations and even orders corresponding to various lines of businesses. Also this hub has a provision to track and review details of Customer requests for various line of businesses. All the details of an order, the estimates generated, quotation provided to the customer, approval of the quote, turnaround time and the billing status and so on can all be tracked from a single screen. This hub provides the user information regarding the status of a request or delays against the order if any.

The hub will have a summary list categorized with Status / Alert tiles and Status Tiles. Each document from the summary list can be selected to view the details.

On click of each document in the Summary List, the system launches a detailed section with further details of the document. On selection of a ‘Request #’ from the Summary List, details of the selected request is displayed in a new section with a header and a tab for Request details. Similarly on selection of Customer Order # from summary list, all details pertaining to that particular order is displayed in new section.

CUSTOMER ORDER MANGEMENT HUB

The **Customer Order Management Hub** enables you to track and review Customer requests, quotations and even orders corresponding to various lines of businesses.

Summary List

This section is categorized with Alert/Exception toggle buttons. Each document from the summary list can be selected to view the details.

That is on click of the hyperlinked document in the Summary List, the system launches a detailed section which has further information of the document. For example on selecting the hyperlinked Request # from the Summary List, details of the selected request will be displayed in a new section below the multiline with a header and a tab for Request details.

Tile Section

This section displays color coded tiles representing various stages of the document which enables you to differentiate between the applicability of the documents whether the tile corresponds to Customer Requests or Customer Orders.

Alert Tiles

- Overdue requests
- Error Request
- Unprocessed Orders
- Part Sourcing Delays
- Cores Overdue

Exception Tiles

- Request Pending Confirmation
- Requests Under Processing
- Unprocessed Request
- Request Pending Acknowledgement
- Orders Pending Acknowledgement
- Orders Pending Confirmation
- Orders Pending Approval
- Orders in Execution
- Pending Part Sourcing
- Pending Shipments
- Pending core Receipts
- Request Amend. Pend Processing

On click of each tile, the information of all applicable request or orders will be displayed in a summary multiline along with next course of actions.

Details Section

On click of the hyperlinked document in the Summary List, a detailed section will be launched providing further details of the document. These detailed sections enables you to review Customer Requests, quotations and even orders corresponding to various line of businesses.

The details will also comprise the information on the list of linked reference document to Customer Order such as Advance Shipping Notes, Goods Inward, Purchase Order, Exchange Order, expense invoices from vendors or Journal vouchers, and so on, and Execution Documents, such as AME/SWO/RO

Key Features

- Ability to review and track Customer requests for various lines of businesses from a common hub page
- Ability to review details of Customer Requests and act on them individually
- Ability to review details of Customer Orders with information of Order Object details, Work scope information and Terms
- Ability to review the linked references to a customer order
- Ability to review details of Customer Orders with information of Order Object Details, Work Scope Information and Terms

2.1. GETTING STARTED

The **Customer Order Management Hub** deals with all types of businesses across multiple customers, therefore there is a need to restrict the access or visibility of certain documents based on conditions to individual users. Thus the hub is enabled with an option to set User Preferences at individual role and username combination. Based on the preferences set, the data visibility and auctioning will be restricted in the hub.

2.1.1 MANAGING SCREEN DEFAULTS & USER PREFERENCES

This activity allows the user to define preferences/filter criteria based on set of configurable parameters to manage data retrieval in **Customer Order Management Hub**. User can set the Preference for a given Role-User-User Interface combination. Only the options defined for the **Customer Order Management Hub** in the **Set Sales Process Parameters screen**, can be defined here.

> *Note that a user will be allowed to set these preferences or use this screen to assign responsibility only if the user has access to the activity **Manage Screen Default and Preferences**.*

1. Select the icon ‘ ’ in the **Customer Order Management Hub** screen. The **Manage Screen Defaults & Preferences** page appears. *See Figure 2.1.*

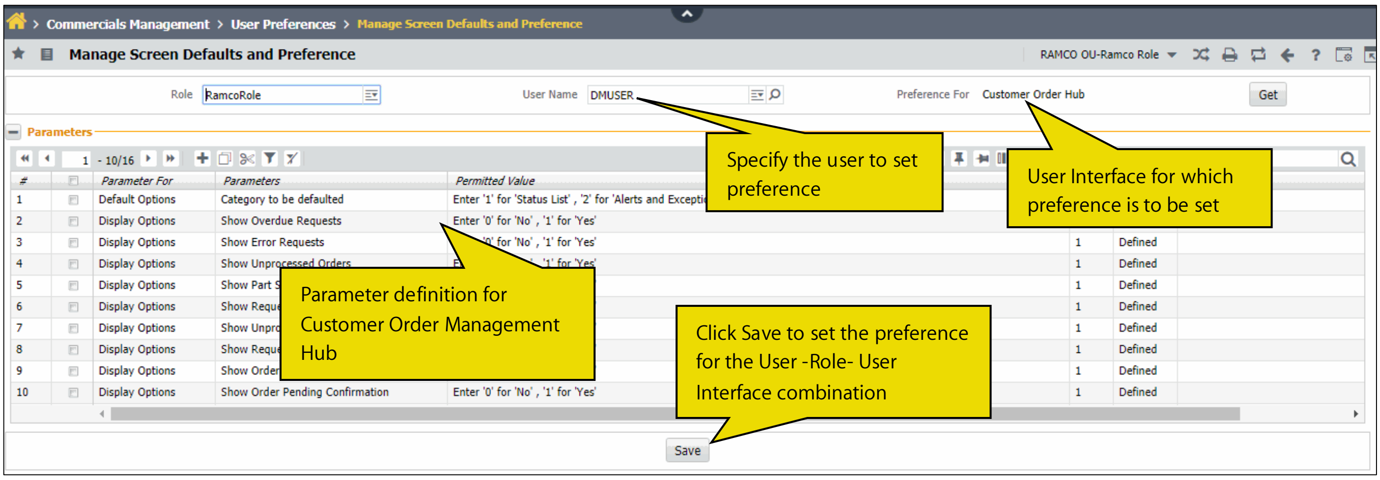


Figure 2.1 Managing screen defaults & preferences

2. Specify the **Role** and **User Name** to set the preference for a given Role-User-User Interface combination.
3. In **Preferences** section, user can define filter criteria with various attributes using ‘AND’ and ‘OR’ operators, to retrieve the Requests or Orders satisfying the filter criteria, for a User-Role combination. The system displays the list of **Parameters** and corresponding **Permitted Values** in the **Parameters** multiline
4. Specify a desired **Value** corresponding to the parameter to define Default Options, Display Options, Configurable Options, Alert Options and Sorting Options for the **Customer Order Management** Hub.
5. Based on the option setting, tiles will be displayed and defaulted at user level in the Customer Order Management Hub.
6. Click **Save** pushbutton to set the user level preferences for the **Customer Order Management Hub**.

Parameter & Permitted Values:

Parameter For	Parameters	Permitted Values
Default Options	Category to be defaulted	Enter '1' for 'Status List' , '2' for 'Alerts and Exceptions'
Display Options	Show Overdue Requests	Enter '0' for 'No' , '1' for 'Yes'

Display Options	Show Error Requests	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Unprocessed Orders	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Part Sourcing delays	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Request Pending Confirmation	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Requests Under Processing	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Unprocessed Requests	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Requests Pending Acknowledgement	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Order Pending Acknowledgement	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Order Pending Confirmation	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Order Pending Approval	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Orders in Execution	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Pending Part Sourcing	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Pending Shipments	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Cores Overdue	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Pending Core Receipts	Enter '0' for 'No' , '1' for 'Yes'
Display Options	Show Request Amend. Pending Processing	Enter '0' for ‘No’, '1' for 'Yes'

2.1.2 ABOUT CUSTOMER ORDER MANAGEMENT HUB

The hub presents only the important and relevant information based on the login user's role or function. This process enables tracking and reviewing the order management cycle, right from setting up the Customer Request to the creation of the order, (Customer Order/Part Sale Order) up to the billing process.

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears. *See Figure 2.2*

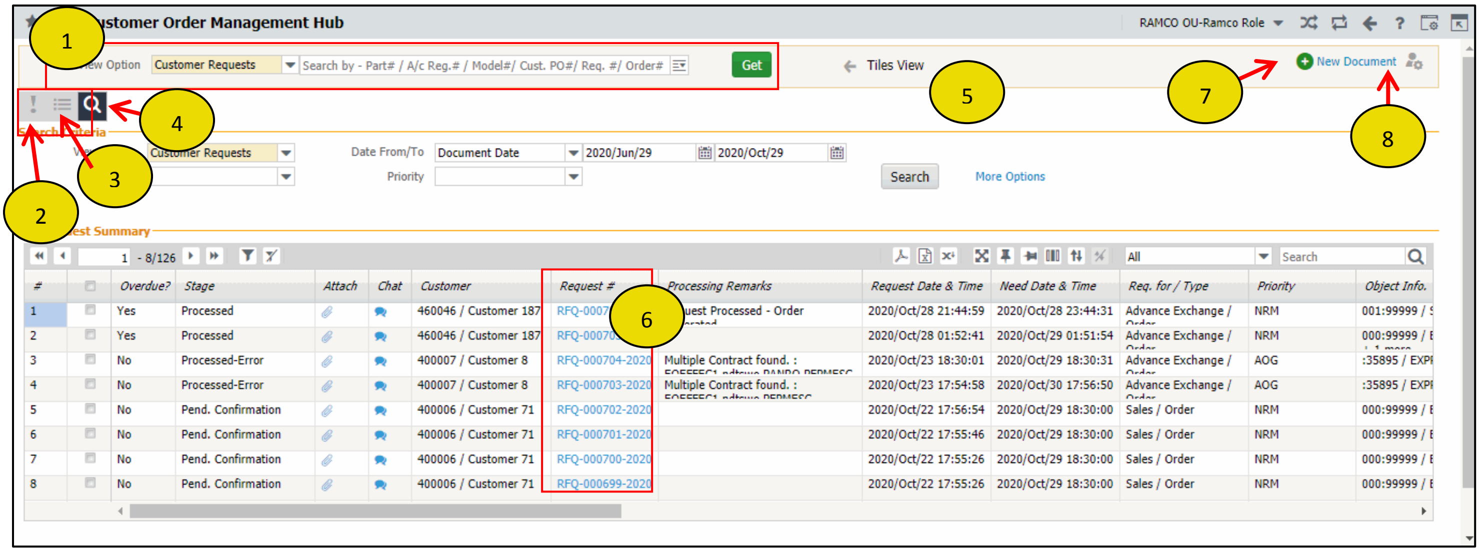


Figure 2.2 Login Customer Order Management Hub

1. The **Quick Search** section with provision for elastic search/smart fill enabled.

Note that the system based on the given input, will enable smart fill to suggest the list of Requests / Orders

2. The **Alert Toggle** button
3. The Exception **Toggle** button
4. The **Search** Toggle button
5. The **Tile View** button, which will enable you to view the toggle section and the tiles section which were hidden due to Quick Access search
6. Hyperlinked document number, clicking of which enables you to process the document further.
7. Click the  **New Document** icon to create a new Customer Request or a new Customer Order.
8. Click the  icon to set **User Preferences** to record and manage default and settings for **Customer Order Management** Hub.

2.2. QUICK SEARCH

This section enables you to perform a context search for either Customer Request or Customer Order as per the View Option Specified. The context search can be given as Part #, Part Description, Customer #, Customer Name, Aircraft Reg. #, Aircraft Model #, Cust. PO #, Req. #, Order #. Based on these filter criteria, the system retrieved details of Customer Request or Customer Orders in the **Request Summary** or **Order Summary** multiline respectively.

2.2.1 Quick Search for Customer Request

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub Management** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears. *See Figure 2.3.*

*Note: By default on launch of the hub, **Customer Request** remains selected in the **View Option** field.*

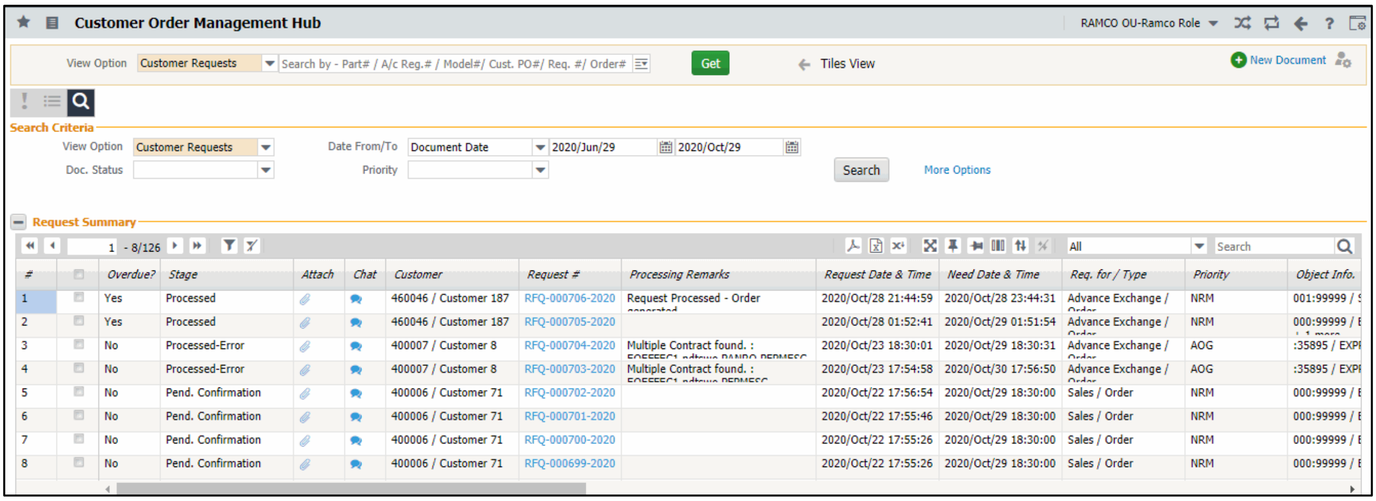


Figure 2.3 Quick Search - Customer Request

1. Select the **View Option** drop-down list box which is smart fill enabled and specify the basis on which you wish to make a quick search and retrieve details in the multiline.
2. Select **Customer Request** from the View Option drop-down list box.
3. In the editable field alongside enter the Aircraft Reg.# or Part # or Model # or Cust. PO # or. Request # or Order # pertaining to the view option selected.
4. Click the **Get** pushbutton. The system retrieves all the records (documents) that are associated with the document type selected in the **Request Summary** multiline below, irrespective of their status, using elastic search query. *See Figure 2.4.*

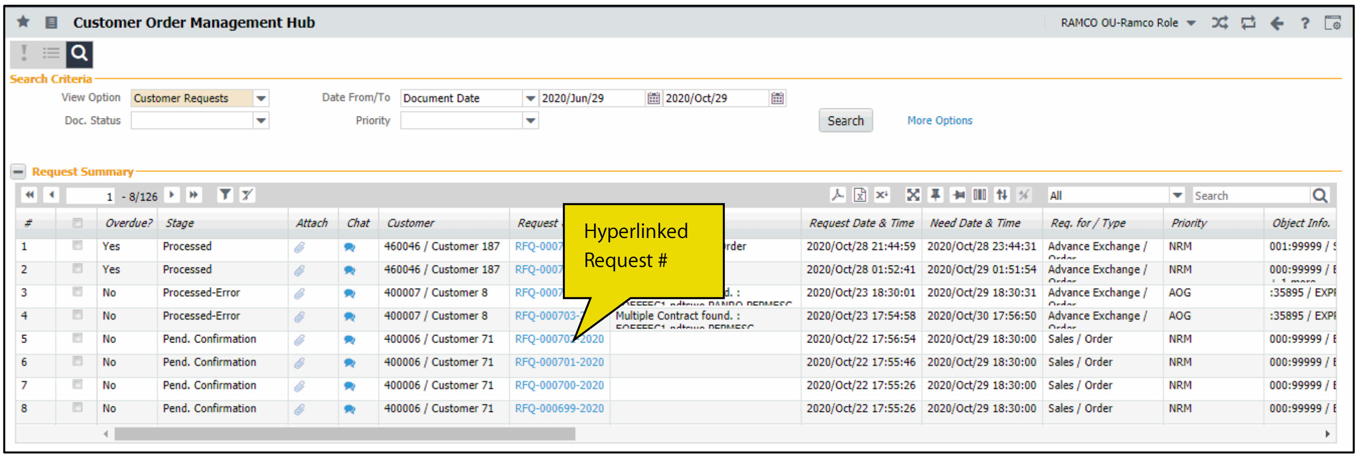


Figure 2.4 Quick Search – Retrieval

5. Select the hyperlinked request number in the **Request #** column in the 'Request Summary' multiline. The system retrieves details below the multiline. *See Figure 2.5.*
6. Click the **Confirm** pushbutton to confirm the request
7. Click the **Cancel** pushbutton to cancel the request
8. Click the **Process Request** pushbutton to process the Customer Request to Customer Order.
9. Click the **Acknowledge** pushbutton to acknowledge the Request.
10. Click the **Reject** pushbutton to reject the Request.
11. Scroll further to view details of the selected document in the hyperlinked column. *See Figure 2.5.*

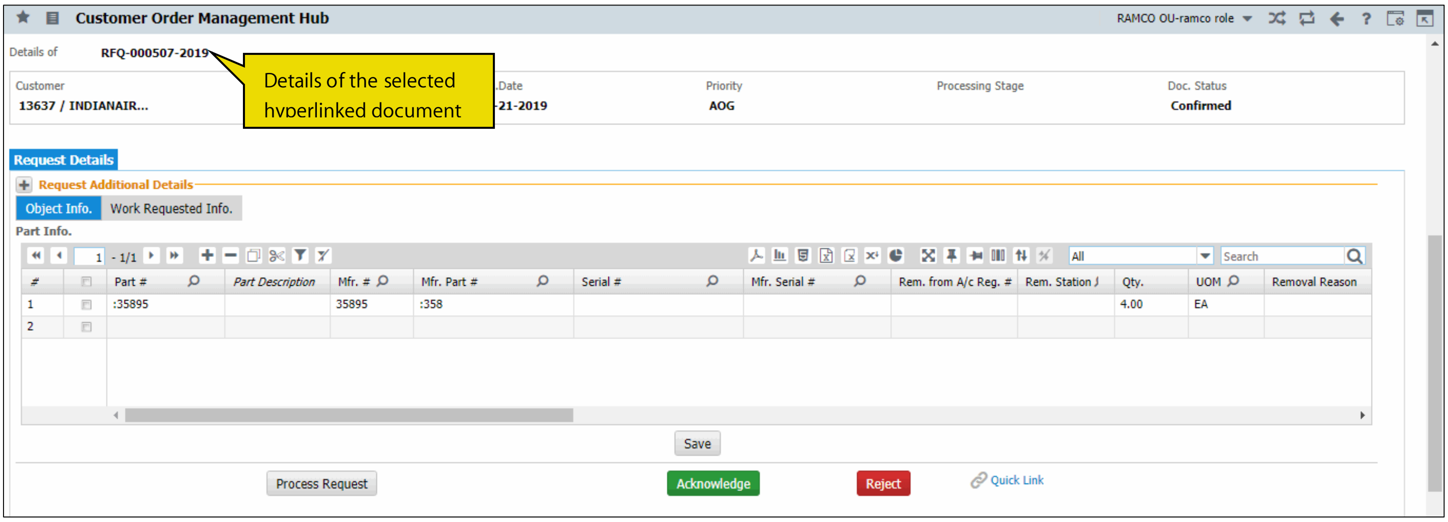


Figure 2.5 Quick Search - scroll

To proceed, carry out the following:

- Select the **Quick Link** hyperlink to traverse to other screens.

2.2.2 Quick Search for Customer Order

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub Management** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears. *See Figure 2.6.*

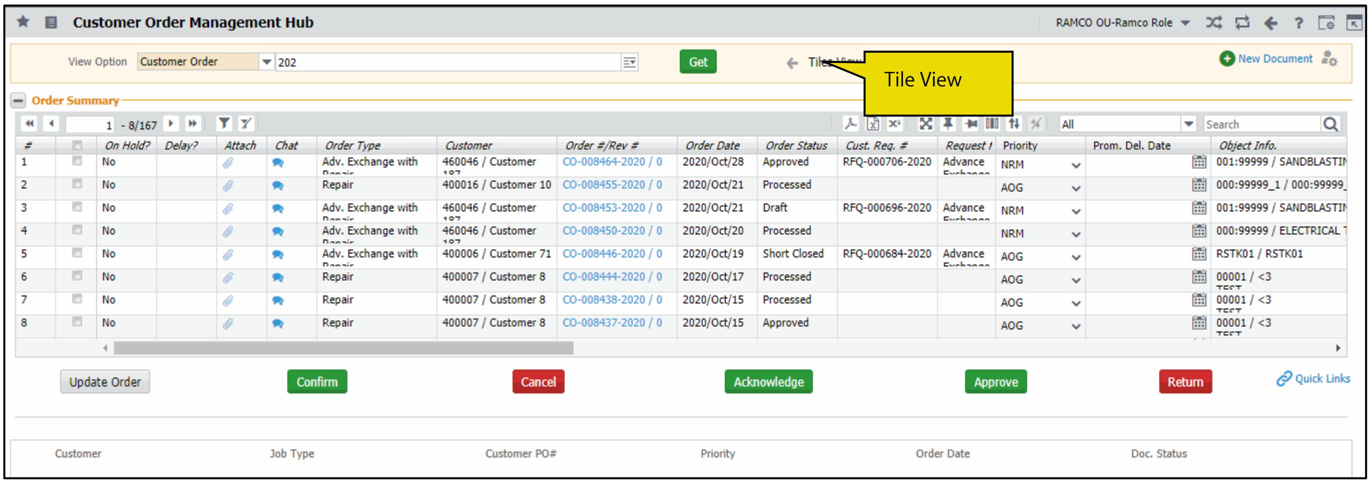


Figure 2.6 Quick Search – Customer Order

2. Select the **View Option** drop-down list box and specify the basis on which you wish to make a quick search and retrieve details in the multiline.

3. Select Customer Order from the **View Option** drop-down list box.

4. In the editable field alongside enter the Aircraft Reg.# or Part # or Model # or Cust. PO # or. Request # or Order # pertaining to the view option selected.

5. Click the **Get** pushbutton. The system retrieves all the records (documents) that are associated with the document type selected in the **Order Summary** multiline below, irrespective of their status, using elastic search query.

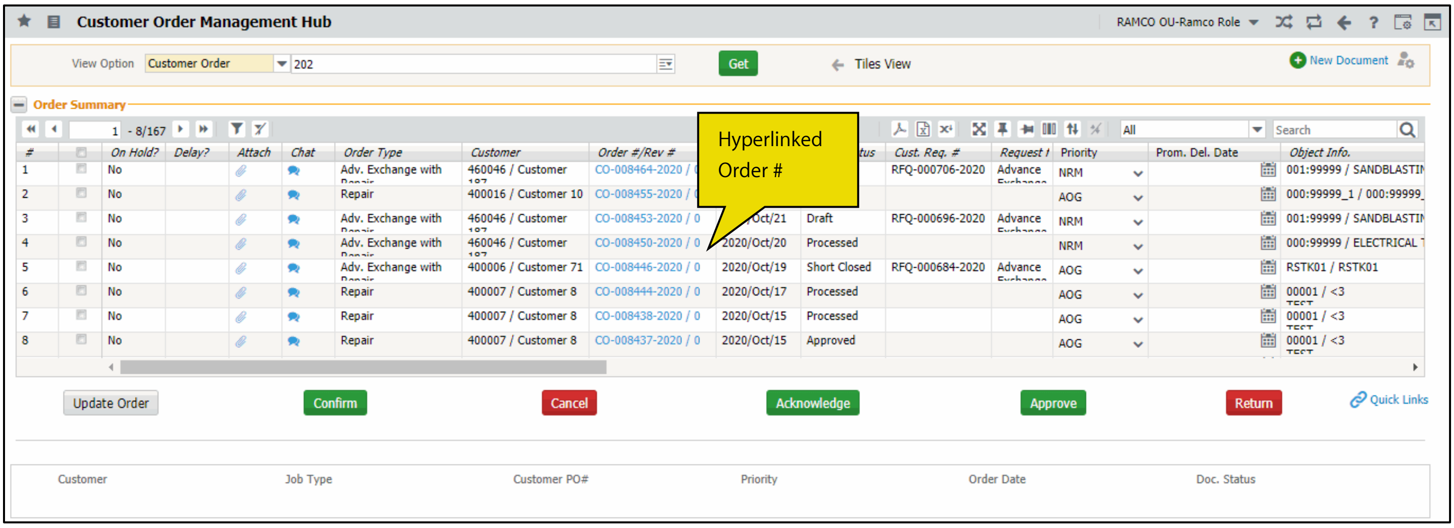


Figure 2.7 Quick Search – Customer Order

6. Select the hyperlinked order number in the **Order # / Rev. #** column in the 'Order Summary' multiline as per the **View Option** selected to view order details. The system retrieves details below the multiline. *See Figure 2.7.*

7. Click the **Update Order** pushbutton to update details of the order.

8. Click the **Confirm** pushbutton to confirm the order

9. Click the **Cancel** pushbutton to cancel the order

10. Click the **Acknowledge** pushbutton to acknowledge the Order

11. Click the **Approve** pushbutton to approve the order.

12. Click the **Return** pushbutton to reject the order.

To proceed, carry out the following:

- Select the **Quick Link** hyperlink to traverse to other screens.

2.3. WORKING WITH CUSTOMER ORDER MANAGEMENT HUB

Customer Orders can be raised against Customer Requests for Repair as well as Exchanges. These orders are required to be tracked along their progress starting from Order confirmation till part sourcing and shipment. Provision is provided in the hub for you to view orders categorized into multiple stage wise and identify the actions required and track them to closure.

2.3.1 How to traverse Customer Order Management Hub - Tile Structure

You can traverse through the various tabs in the Customer Order Hub through tiles, separate tiles to track the stages of a Customer Order will be displayed. Each tile retrieves details as per the respective document statuses. Alternatively, you can also directly process details, click here to know more.

Note: The system displays the tile sections based on the visibility options as set in the 'User Preference Setting' activity of the 'Utilities' business component for the login user.

Separate tiles to track the stages of a Customer Order against Alert and Exception toggle sections.

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears. *See Figure 2.8.*

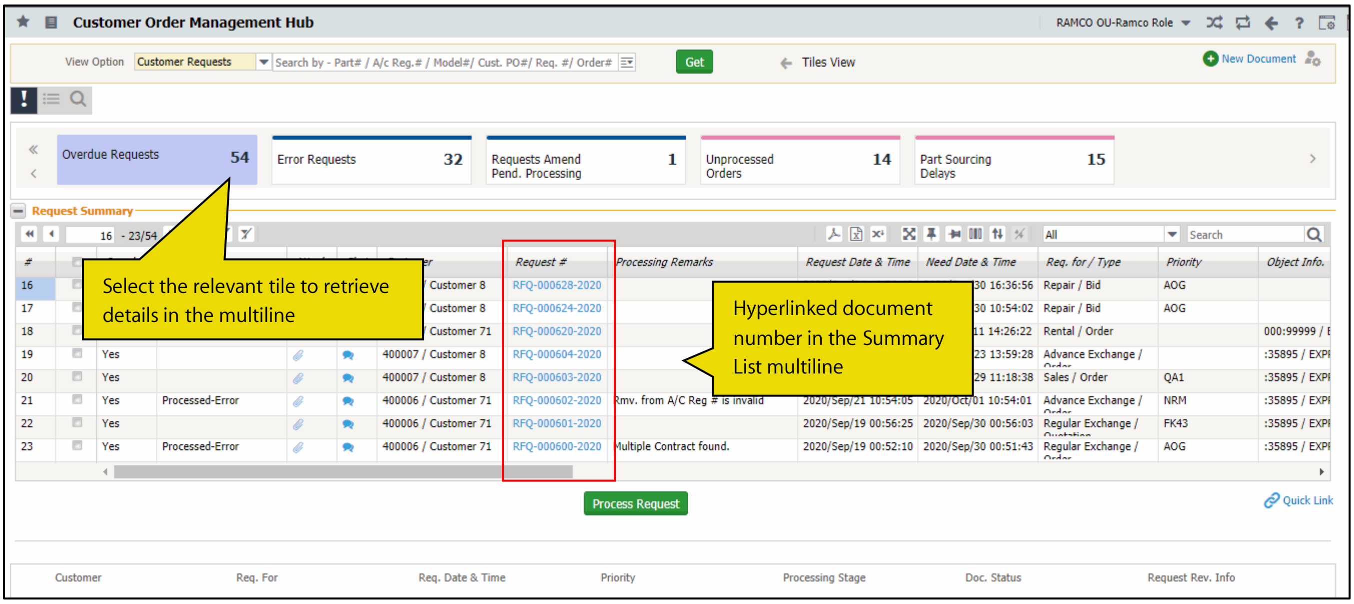


Figure 2.8 Customer Order Management Hub – Customer Request

2. Select the relevant tile to have a status-wise breakup of Customer Request / Customer Order documents. *See Figure 2.8.*

   Or

3. Select the **Alert** or **Exception** toggle button to view and manage Customer Orders/Customer Requests documents that require immediate action and then select the relevant tile section based on which you wish to retrieve details.

Tiles Structure - Applicability

The hub is structured to provide the summary information first and allow the user to review and act on bulk at summary level itself by providing sufficient information upfront. The summary information for Customer Requests and Customer Orders are segregated based on the document status and any exceptions identified.

This segregation is provided to the user by means of filtering tiles – based on Exceptions and Statuses. Further details of a specific document can be accessed on need basis, by simply clicking on individual documents in **Summary List** multiline.

To differentiate between the applicability of the tiles on Customer Request and Customer Order, the system displays the tiles in color code as below:

- Pink – Indicates applicability of the tile on Customer Order only.
- Blue- Indicates applicability of the tile on Customer Request only.

Tiles applicable for Customer Request

The system retrieves details of Customer Request of the corresponding tile based on the status of the document as given below:

- Request Pending Confirmation - All requests for which request is in either 'Draft' or 'Fresh' status.**Requests Under Processing -** All the requests in the summary multiline for which the status of the Request is 'Confirmed' and the Request Processing status is 'Under Processing', irrespective of Request For or Request Type
- Unprocessed Requests - All the requests in Confirmed status and Req. Processing Status is processed but order not yet generated.

Note: Request Documents which are not processed into an Customer Order due to Automation Rule Failure, Processing Remarks column in the Part multiline in Request Summary Multiline and Detail section, will display the remarks with reason for such failure

- Request Pending Acknowledgment - All requests with acknowledgment requirement set as 'Required' and the acknowledgment is not yet done.
- Overdue Request - The system retrieves the following:
  - ✓ If 'Request Type' is Order - all the confirmed requests which are yet to be Processed into Order with Need date less than Current date
  - ✓ if the request type is for Quote - all the confirmed requests which are yet to be Processed into Pre-quote with Need date less than Current date
- Error Request - All requests which have 'Request Processing' status as 'Processed-Error' irrespective of Request For or Request Type **Request Amend. Pend Processing -** All the Customer Requests against which latest revisions are available in 'Confirmed' status will retrieved under this tile.

Tiles applicable for Customer Order

The system retrieves details of Customer Order of the corresponding tile based on the status of the document as given below:

- Unprocessed Orders - All customer orders with exchange with Exchange Orders in 'Draft' status without pool or demand warehouse identified
- Part Sourcing Orders – All customer orders for exchanges that does not have any source issue document generated or the source part issue document is not yet confirmed.
- Cores Overdue – All customer orders for exchange for which core part is not received beyond the number of days as per the settings.
- Orders Pending Acknowledgment - All orders which have Ack. Requirement set as 'Required' against the Sale Type in evaluated Contract / Part Sale list in the "Define Process Entities" activity and the acknowledgement is not yet done.
  - ✓ All the Customer Orders with the Acknowledgement Status 'Pending'
  - ✓ All the Part Sale Orders with the Acknowledgement Status 'Pending'.
- Orders Pending Confirmation - All Customer Orders that are in 'Draft' and "Fresh" status.
- Orders Pending Approval - The system retrieves details all the Customer Orders that are "Confirmed" and yet to be approved.
- Orders in Execution - The system retrieves all the Customer Orders for which execution document is

status is Draft, Fresh, Planned, In-Progress and Completed

- Pending Part Sourcing - The system retrieves all Customer Orders with Exchange Orders for which issue document is yet to be confirmed or no issue document is created .
- Pending Shipment - The system retrieves all Customer Orders against which shipment is still pending.

  The completion of shipment against the customer order will be determined based on the parameters added under 'Set Sales Process Parameters' against Display parameters for: 'Customer Order Management Hub'
- Pending Core Receipts - The system retrieves all Customer Orders for which source part is already shipped but core part is yet to be received.

Note: The system displays only those buttons that are applicable for the selected tile.

4. Click on the hyperlinked document number in the multiline to proceed further. The system retrieves details below the multiline. *See Figure 2.9.*

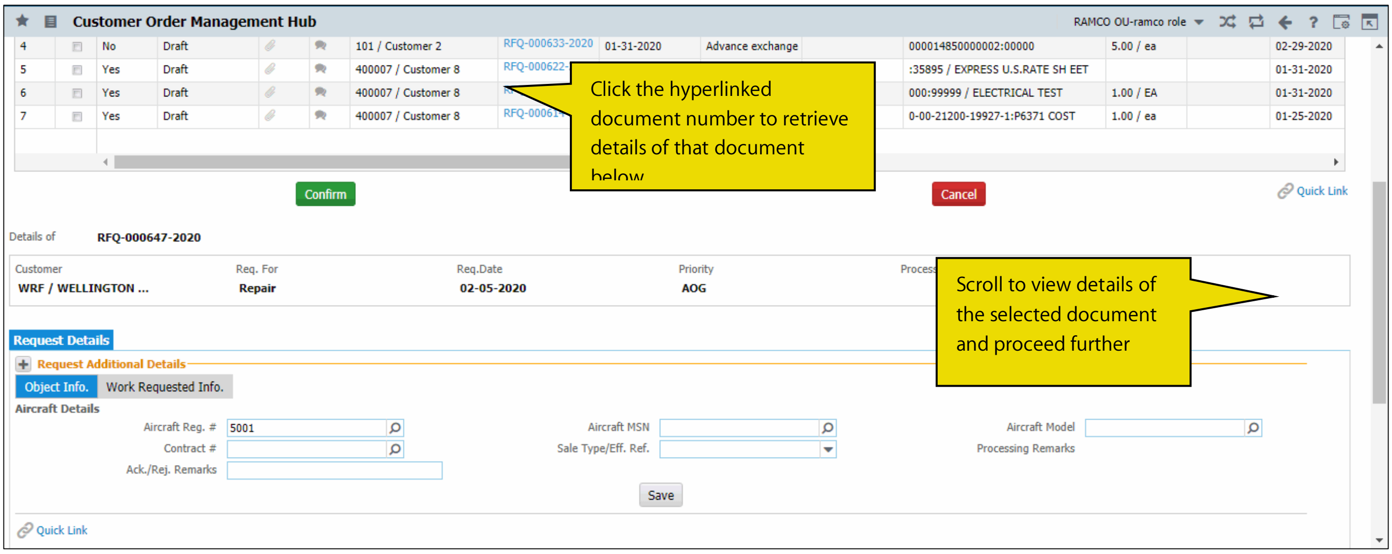


Figure 2.9 Request Details tab

BULK PROCESSING OF CO AND REQUEST

The **Customer Order Hub** is structured to provide the summary information first and allow the user to review and act on bulk at summary level itself by providing sufficient information upfront. The summary information for Customer Requests and Customer Order are segregated based on the document status and any exceptions identified.

Bulk Processing can be done through ether traversal from **Quick Search** or through the Alert or Status **Tile Sections**. Provision has been made for multiple documents to be selected and processed at the same time.

3.1. Bulk Processing of Customer Requests

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears.
2. Select Customer Order in the **View Option** drop down list box.
3. In the editable field alongside enter the Aircraft Reg.# or Part # or Model # or Cust. PO # or. Request # or Order # pertaining to the view option selected.
4. Click the **Get** pushbutton. The system retrieves all the records (documents) that are associated with the document type selected in the **Request Summary** multiline below, irrespective of their status, using elastic search query. *See Figure 3.1.*

Note: Alternatively you can also use the Tile section, that is, the color coded pink tiles to traverse through the documents and perform bulk processing of the Customer Requests.

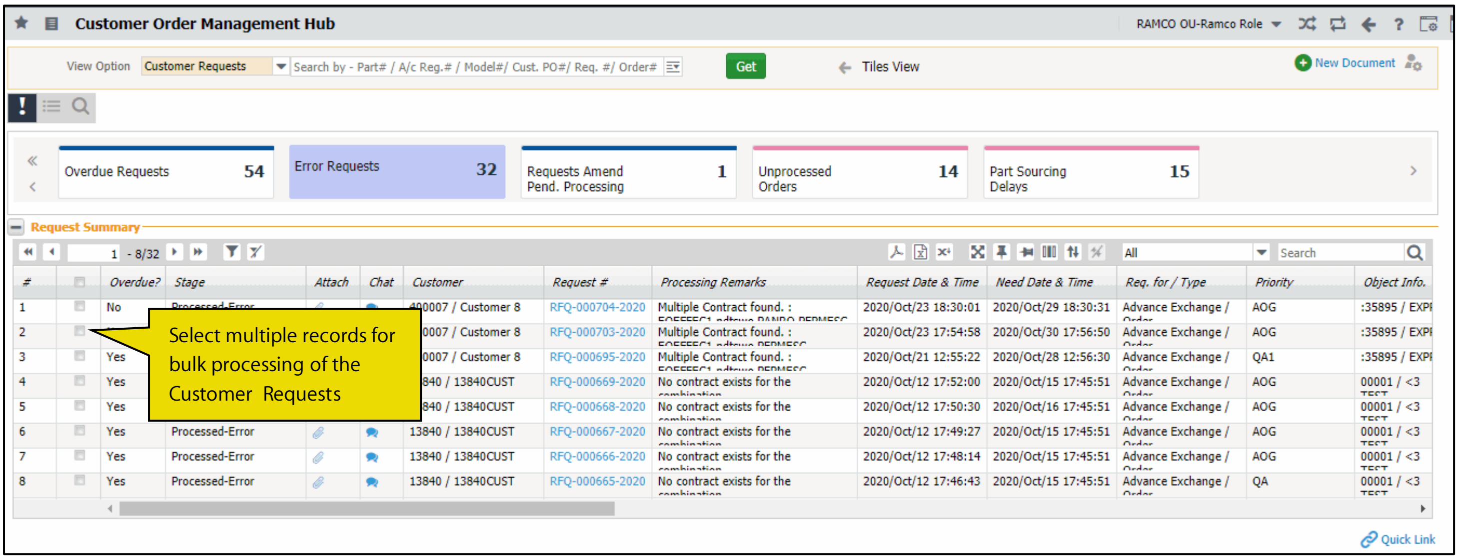
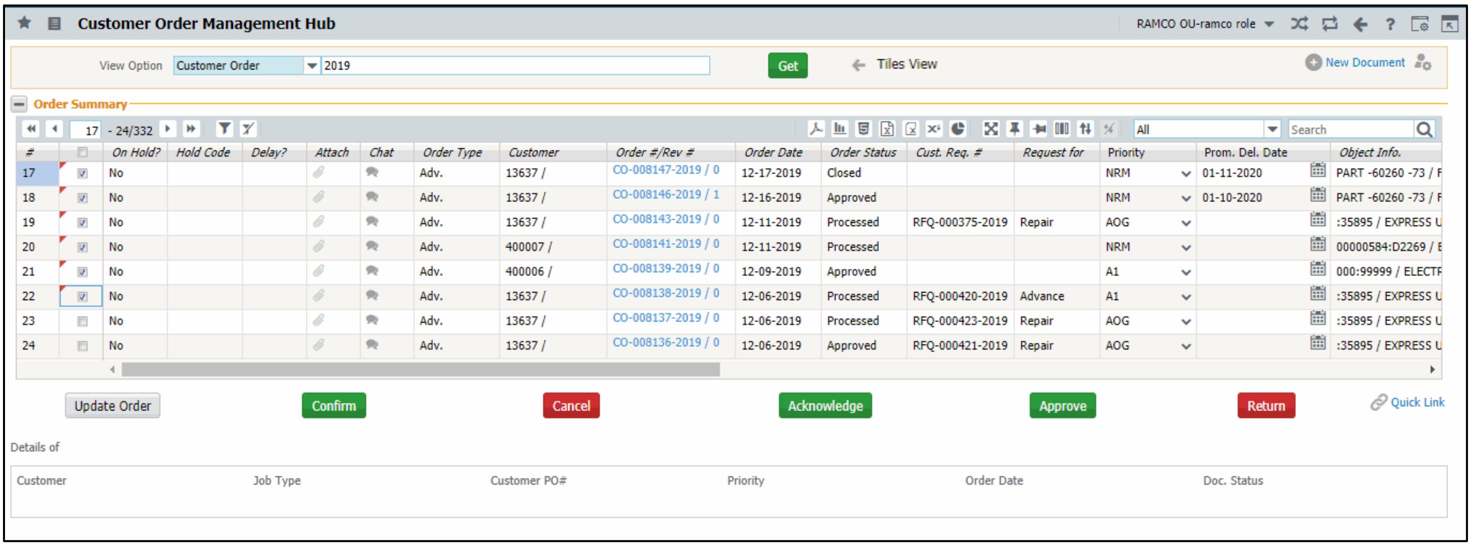


Figure 3.1 Bulk processing of Customer Requests

3.2. Bulk Processing of Customer Orders

1. Select the **Customer Order Management Hub** screen from the **Customer Order Management Hub** business component under the **Commercials Management** business process. The **Customer Order Management Hub** screen appears.
2. Select Customer Request in the **View Option** drop down list box.
3. In the editable field alongside enter the Aircraft Reg.# or Part # or Model # or Cust. PO # or. Request # or Order # pertaining to the view option selected.
4. Click the **Get** pushbutton. The system retrieves all the records (documents) that are associated with the document type selected in the **Order Summary** multiline below, irrespective of their status, using elastic search query. *See Figure 3.2.*

Note: Alternatively you can also use the Tile section, that Is, the color coded blue tiles to traverse through the documents and perform bulk processing of the Customer Orders.



processing of Customer Orders

PROCESSING SELECTED REQUEST FROM SUMMARY MULTILINE

4.1. PROCESSING SELECTED REQUEST DOCUMENT FROM SUMMARY MULTILINE

This section enables you to add a part, modify details of the added part. Note that only documents that are in Fresh status can be added. For Customer Requests that are not transferred through automation, you can manually process the request and also view the reason why transfer of Customer Request to Customer Order has not happed through automation.

1. Select the hyperlinked **Request #** in the Request Summary multiline. The **Request Details** tab page appears.

   See Figure 4.1.

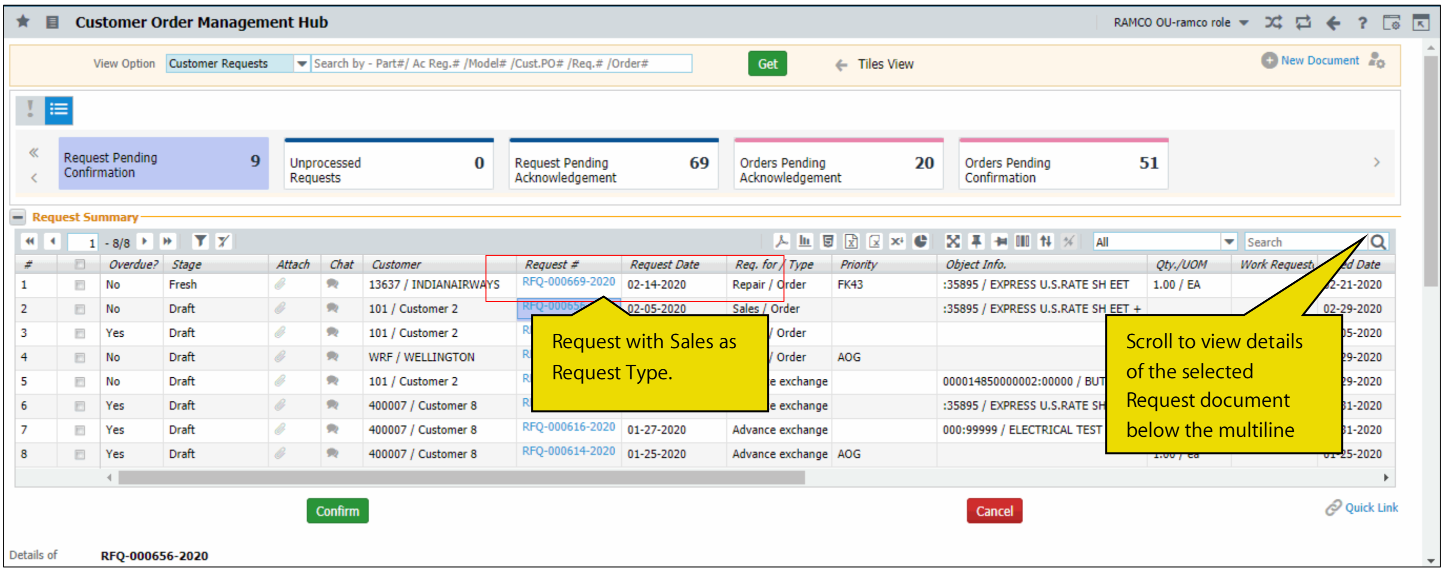


Figure 4.1 Customer Request - Sales

2. Scroll to view the details of the selected Request document below the multiline. *See Figure 4.2*.

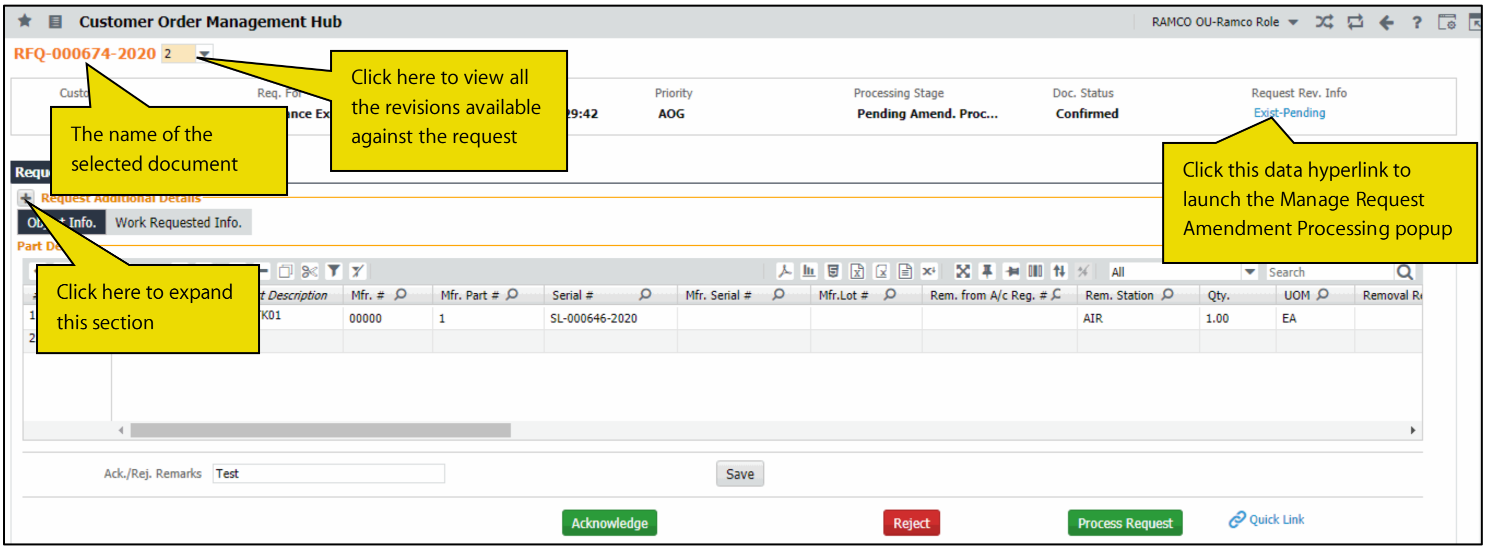


Figure 4.2 Customer Request - Sales

*Note that the panel above the **Request Details** tab displays details of the Customer Request including information such as the name of the customer who made the request and other details like the processing stage of the CR and its status.*

Manage Request Amendment Processing

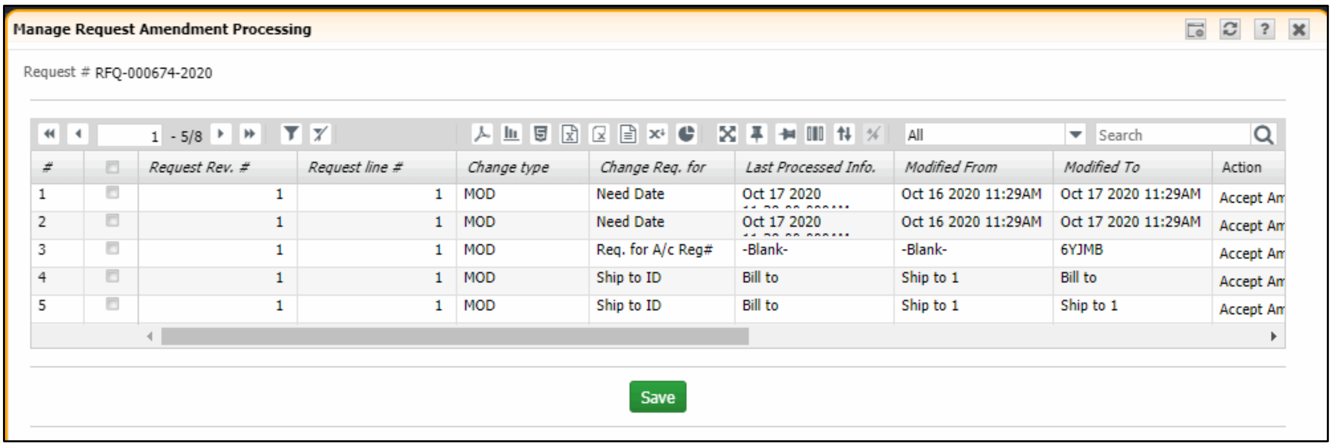


Figure 4.3 Managing request amendment processing

Note that this popup enables you to review all the control level changes with respect revisions of the request

4.1.1 Processing Request document of Request Type Sales

1. Click the icon to expand the **Request Additional Details** section. *See Figure 4.3.*

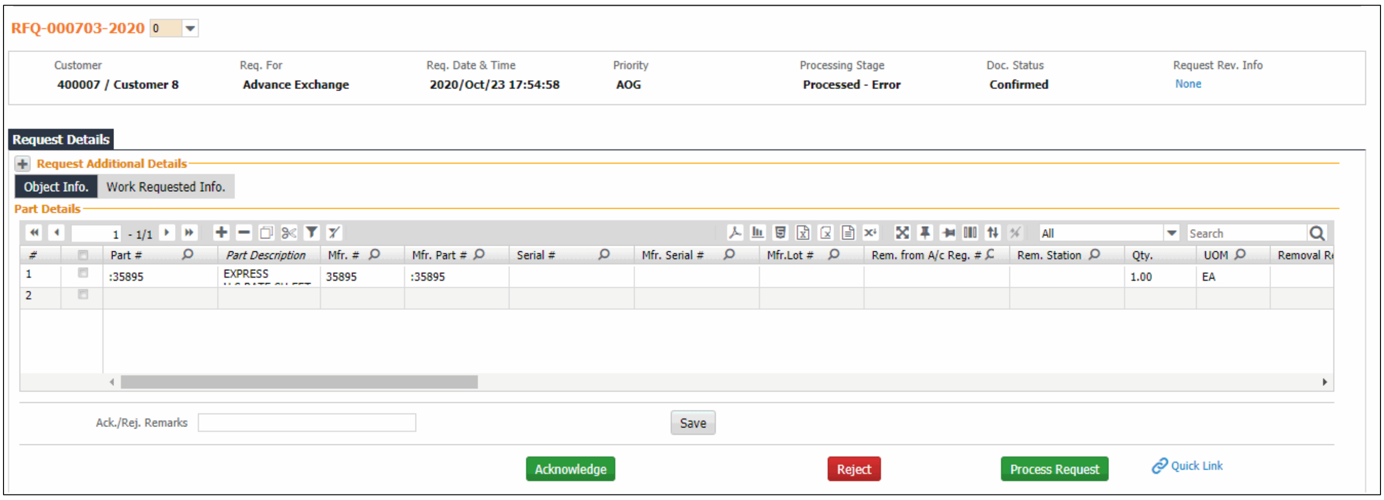


Figure 4.3 Request Details tab - Sales

2. Enter details such as **Category** to which the customer request belongs, the **User Status** against the request, the date on which the part is required by the customer in the **Need Date** field and specify other details.

Part Info. multiline

This section enables you to add and process a part. Note that this is applicable only if Request Type is ‘Sales’.

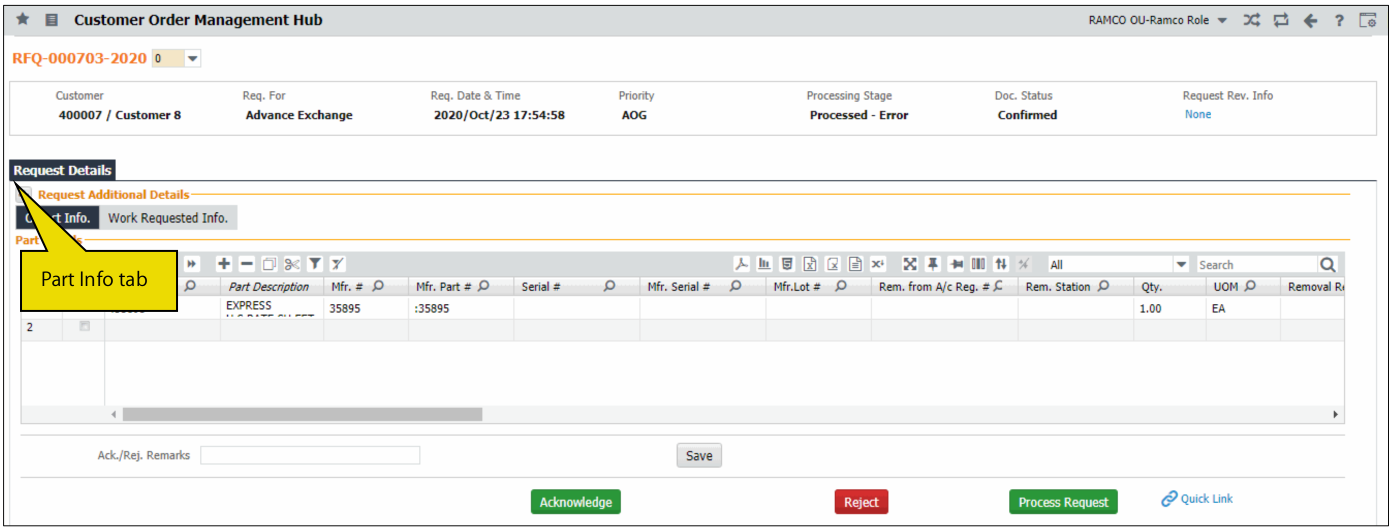


Figure 4.4 Request Details Tab - CR - Sales

1. Enter details such as **Part #**, the name of the station where the part is removed from the aircraft in **Rem. Station**, the quantity of the part in **Qty.** column.
2. Provide the date on which the part is required by the customer in the **Need Date** column and enter the other details in the multiline.
3. Click **Save** pushbutton

Note: The system displays Part Info tab alone if the Request Type is Sales, whereas both Part Info and Work Request tabs will be displayed in case of Advance Exchange or Repair request types.

4.1.2 Processing Request Documents of Request Type Advance Exchange or Repair

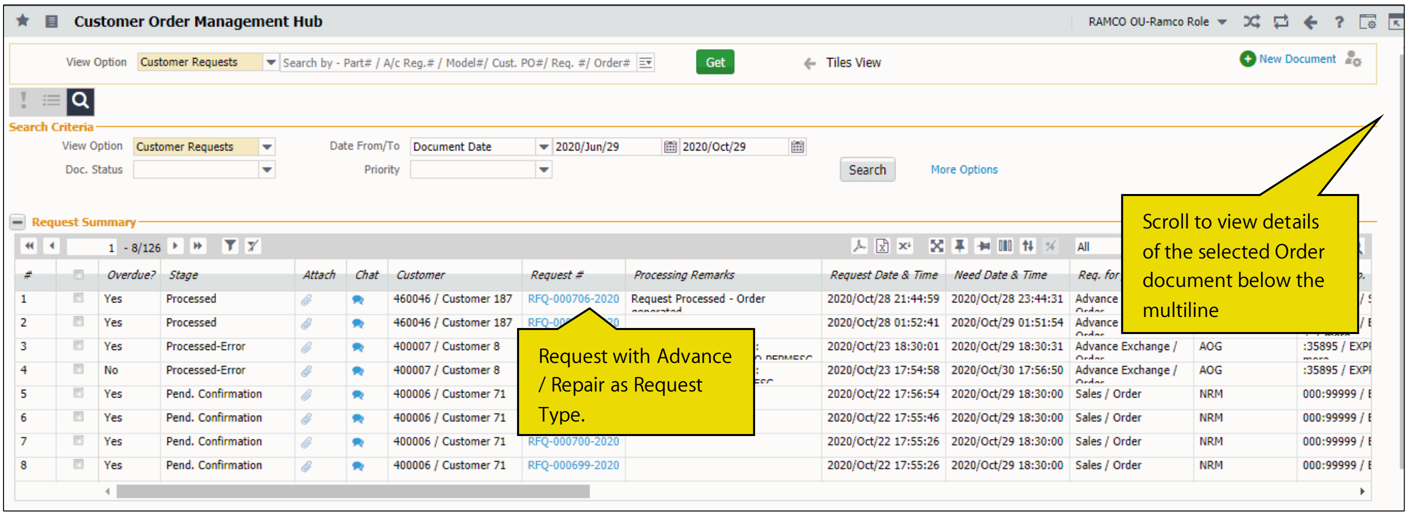


Figure 4.5 Request Details Tab - CR – Advance Exchange/Repair

1. Scroll to view the details of the selected Request document below the multiline. *See Figure 4.6*.

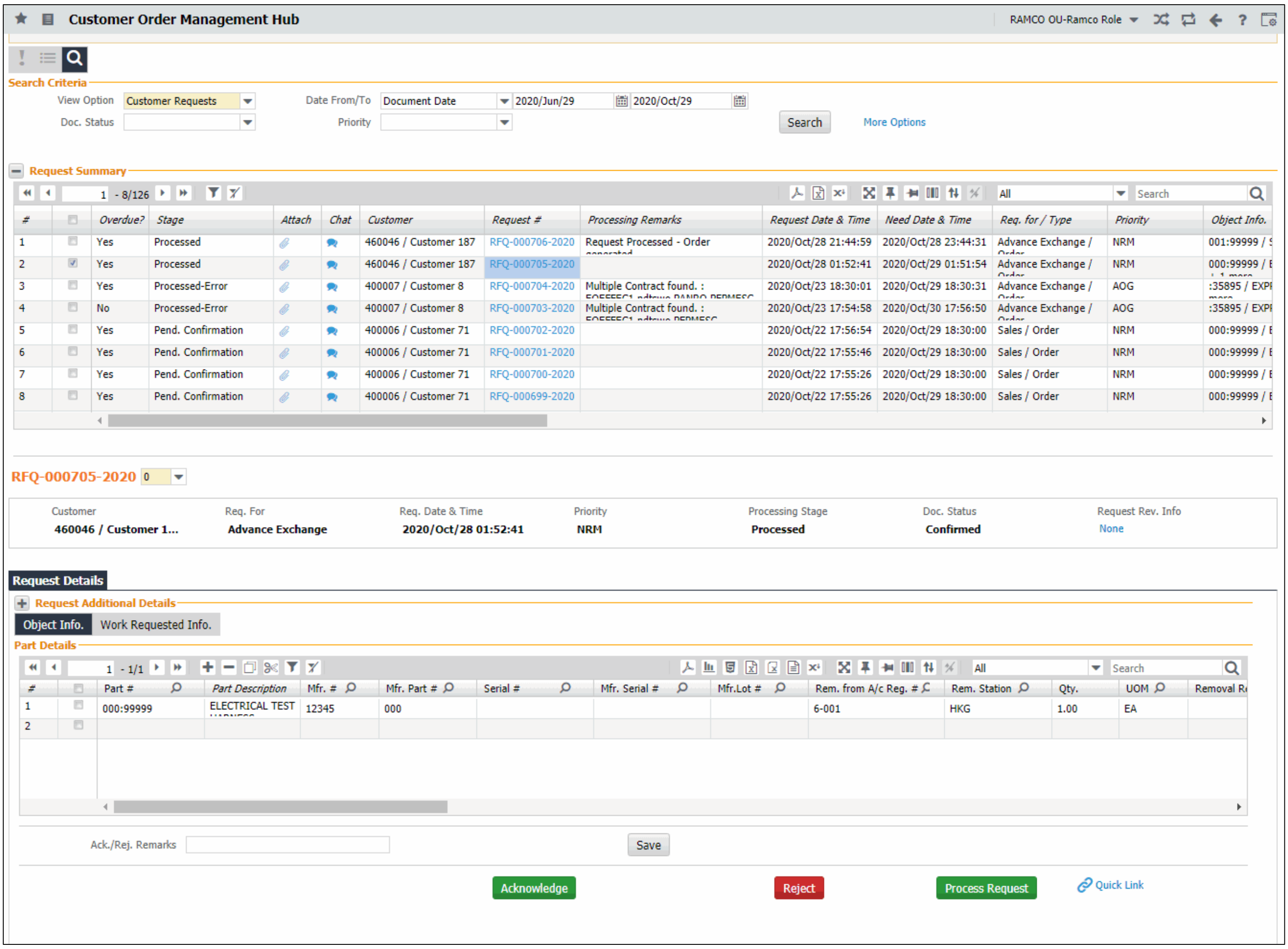


Figure 4.6 Request Detail Tab – Advance Exchange or Repair

2. In the Request Additional Details section, enter details such as **Category** to which the customer request belongs, the **User Status** against the request, the date on which the part is required by the customer in the **Need Date** field and specify other details.

3. Select the [Object Info](#). tab to view the part or aircraft details of Customer Request.

4. Select the [Work Requested Info](#). tab to view the work requested details of the Customer Request.

Object Information Tab

In this tab details of Repair or Advance Exchange against a request can be viewed. Modifications can be made provided the document is in ‘Fresh’ status.

Note: By default the system displays the Part Info. Multiline under the Object Info tab

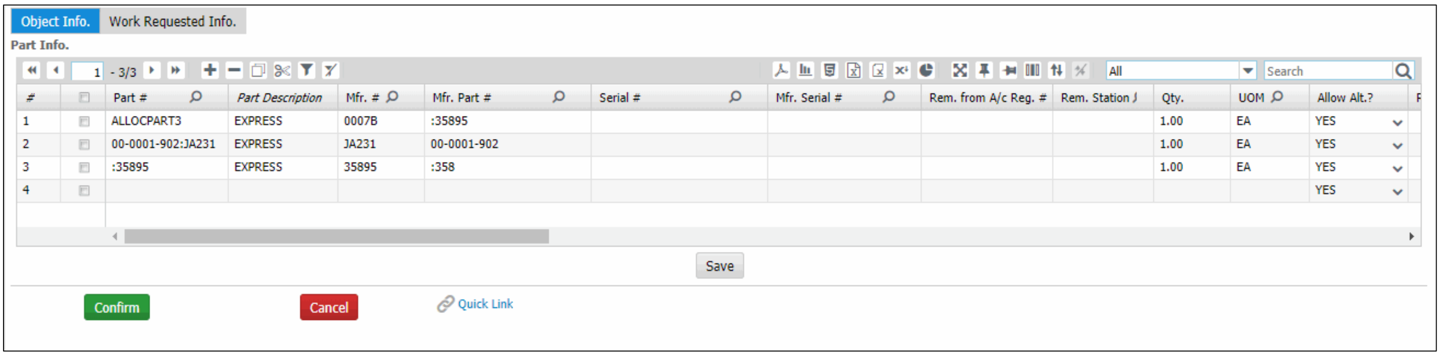


Figure 4.7 Request Detail Tab - Object Info

Work Requested Information Tab

In this section Customer Requests in 'Fresh' status can be modified, the system generates a new revision number against which the new modified details will be saved.

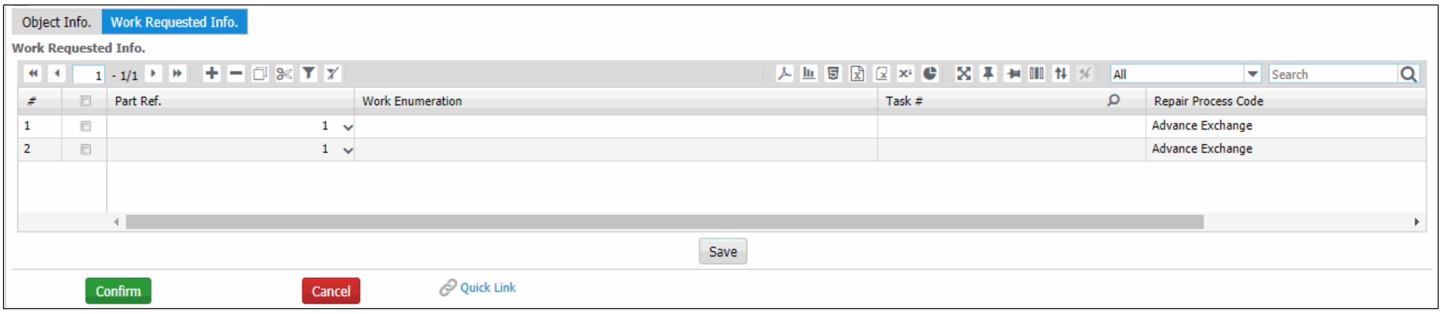


Figure 4.8 Request Detail Tab – Work Requested Info.

4.2. PROCESSING SELECTED ORDER DOCUMENT FROM SUMMARY MULTILINE

1. Select the hyperlinked **Order #** in the Request Summary multiline. The **Request Details** tab page appears.

   See Figure 4.9.

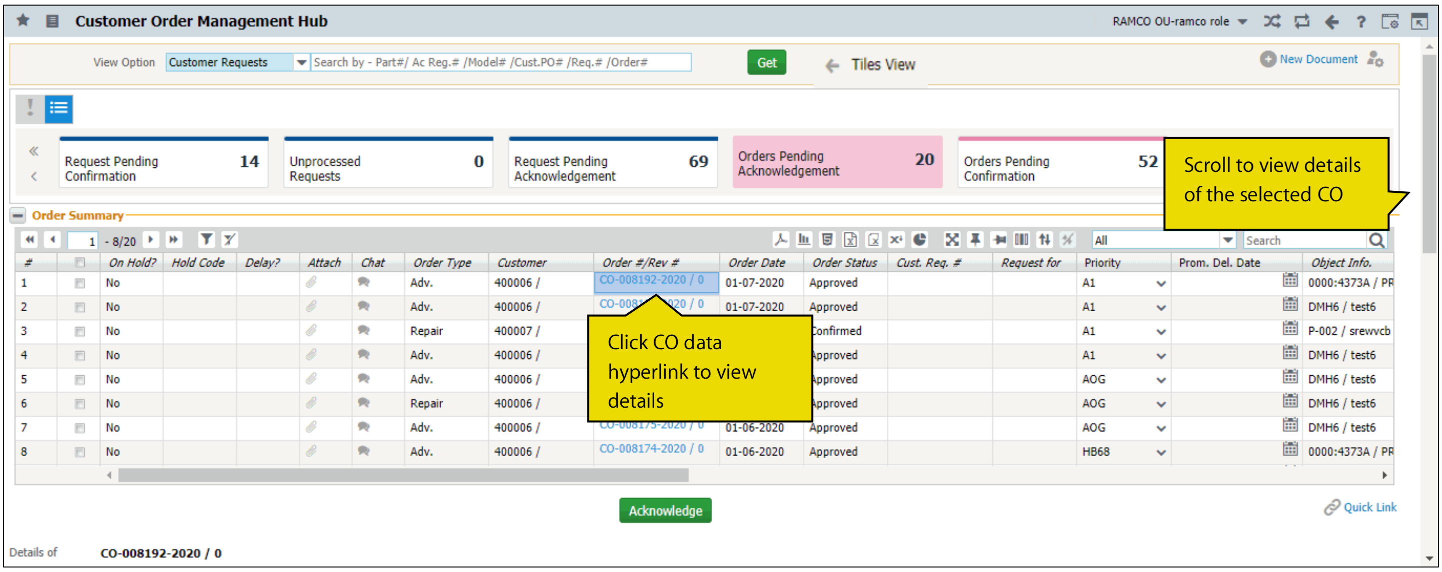


Figure 4.9 Customer Orders – Details

2. Scroll to view the details of the selected Request document below the multiline. See Figure 4.10.

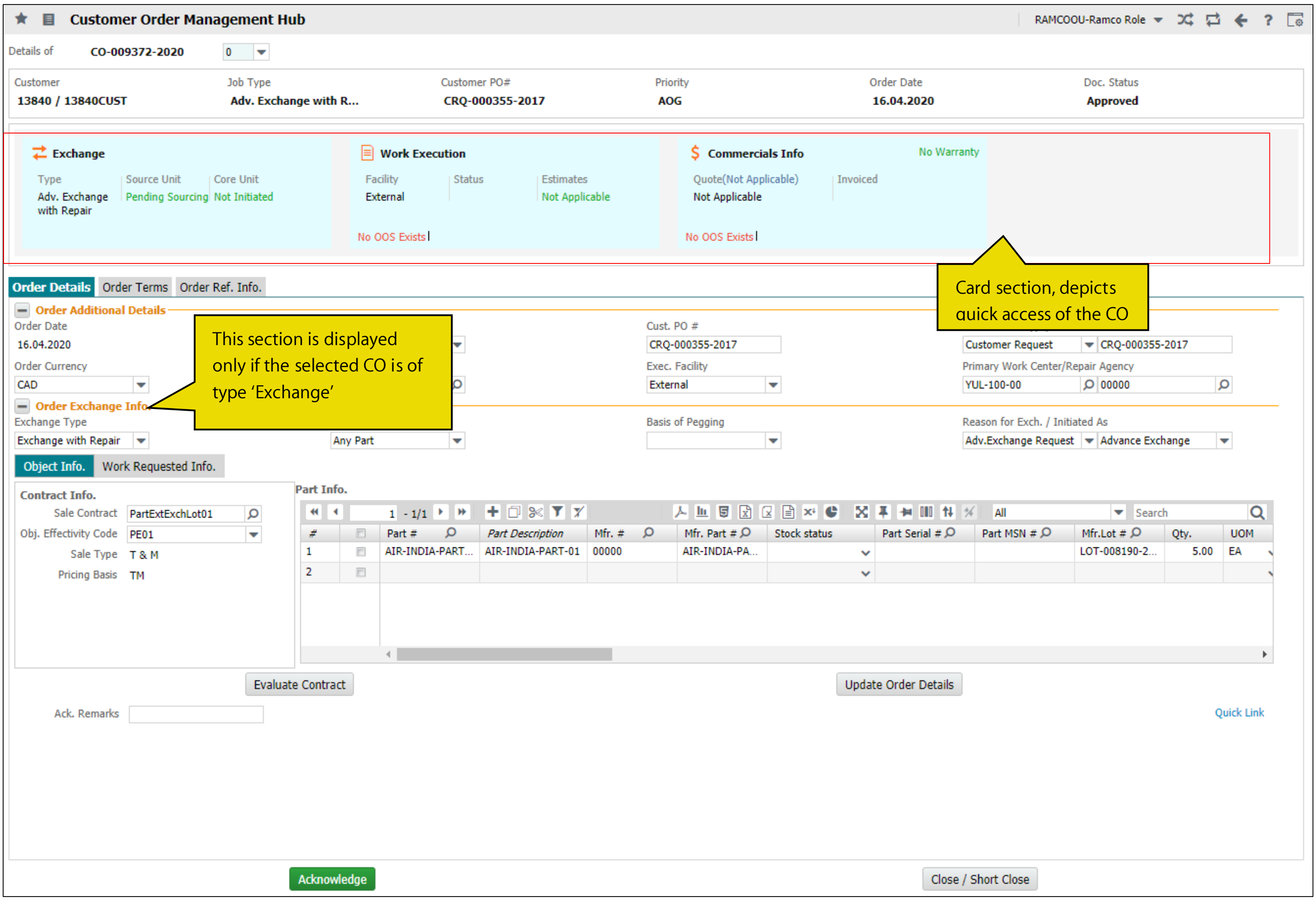


Figure 4.10 Customer Orders - Details

Note: The system displays the Order Exchange Section (Refer Fig 4.10) only if the selected Order is of type 'Exchange'

Card Section

This section is a quick summary on the Order status, Turnaround time and commercial information is provided upfront as highlighted cards.

- Exchange: This card will be displayed only for Customer Order for Exchange
- Work Exchange: This card will be displayed for all the Customer Order for Exchange and Repair.
- TAT Info.: This card will be displayed only when TAT details for Customer Order are available.
- Commercial Info: This card displays the quote and Invoice Details for Customer Order.

1. Select the **Request Details** tab page to view and record the all necessary details of Request Document.

Note: The system displays Request Details tab in the screen (Refer Fig 4.10) along with the other tabs only if the Customer Order has Request document.

2. Select the Order Details tab page to view and record all necessary details of Customer Order which includes Primary Details and Work Execution Information.
3. Select the Order Terms tab page to view and record all Shipping, Billing and Warranty Terms related to Customer Order.
4. Select the Order Ref. Info. tab page to view all linked reference document (SWO, AME, EO etc) in the Customer Order.

Note: The system displays only those buttons that are applicable for the selected tile.

3.1.1 Order Details tab

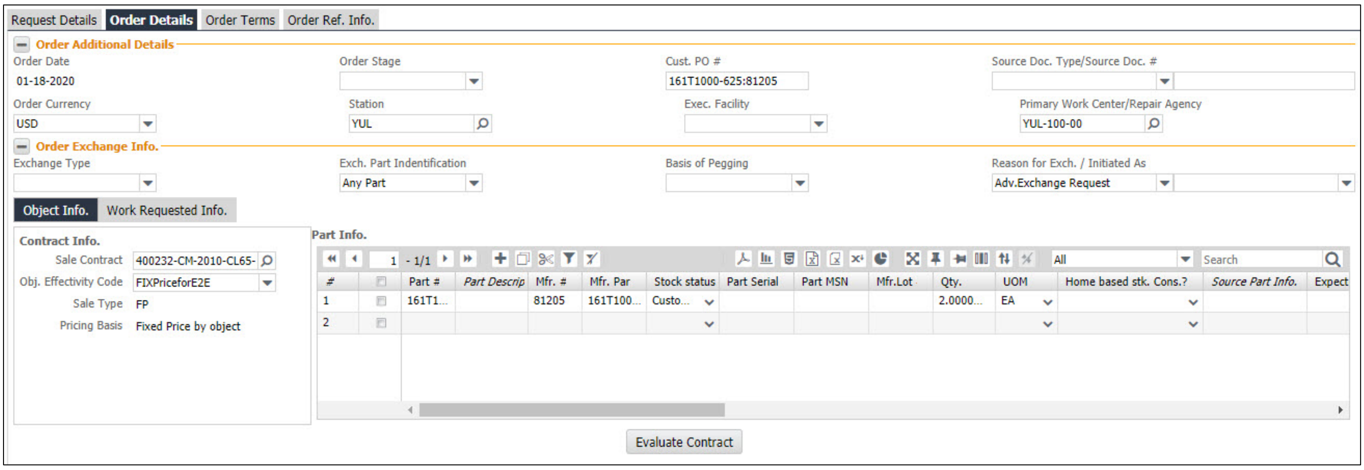


Figure 4.11 Order Details tab

1. Enter the **Order Stage**, **Cust PO #, Source Doc**. **Type/Source Doc. #, Order Currency**, **Station** and other details in the **Order Additional Details** section.
2. Use the **Exchange Type** drop-down list box to specify the type of part exchange and indicate whether the customer order involves exchange of a specific Part or any Part. In **the Exch. Part Identification** drop-down list box.

3. Provide the **Basis of Pegging**, to indicate how the customer order for the exchanged part must be tagged for identification with the customer goods receipt and select the **Reason for Exch./Initiated As**.

4. Select the **Object Info** tab to view Repair or Advance Exchange.

5. Select the **Work Requested** Info tab modify Customer Orders in Fresh status and generate new revision number.

Object Information tab

In this tab details of Repair or Advance Exchange against a part order can be viewed. Modifications can be made provided the document is in 'Fresh' status.

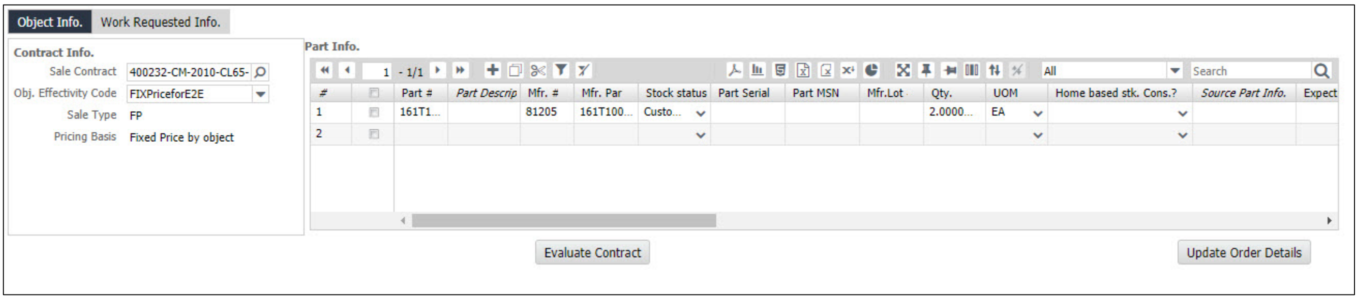


Figure 4.12 Object Info tab

1. Enter the **Contract Information**, such as **Sale Contract** for the Customer Order.

2. Use the **Object Effectivity Code** drop-down list box to specify the object effective code applicable for the Customer Order.

Work Requested Information tab

In this section Customer Orders in 'Fresh' status can be modified, the system generates a new revision number against which the new modified details will be saved.

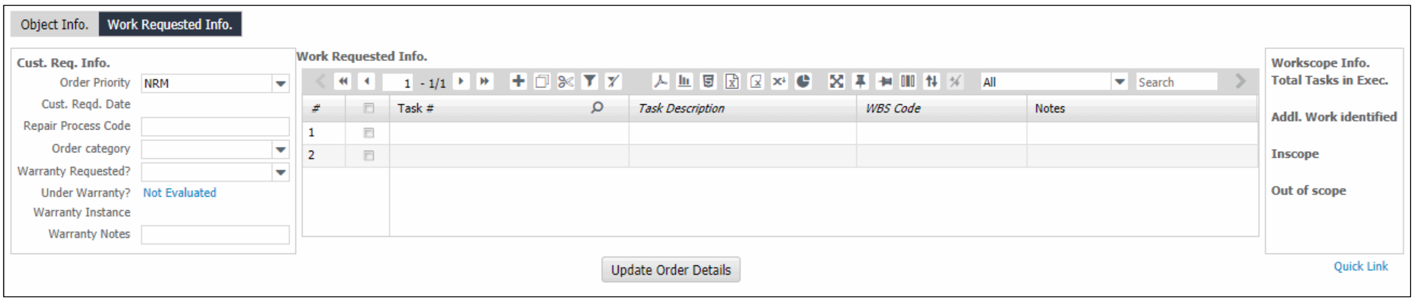


Figure 4.13 Object Info tab

1. In the **Cust. Req. Info**. section use the Order Priority drop-down list box to specify the priority assigned to the order.

2. Specify the repair process to be executed for the Customer Order in the **Repair Process Code** field.

3. Use the **Order Category** drop-down list box to select the order to which the Customer Order belongs.

4. Specify whether warranty is requested in the Warranty Req.? drop down list box and provide details of the warranty agreement in the **Warranty Notes** field.

3.1.2 Order Terms Tab

This section enables you to process both shipping billing and warranty related details of the Customer Order.

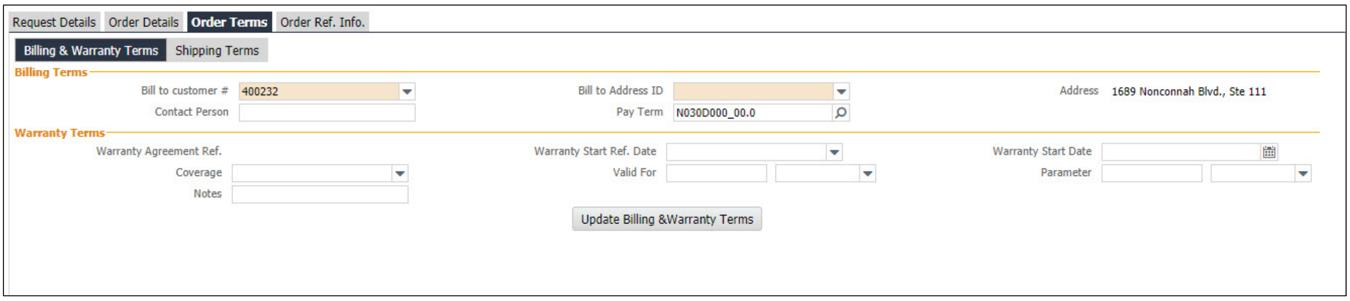


Figure 4.14 Request Details tab

1. Select the Billing & Warranty Terms to record billing and warranty details.
2. Select the Shipping Terms tab to record shipping details.

Billing & Warranty Terms tab

Update warranty terms and other fields in this tab

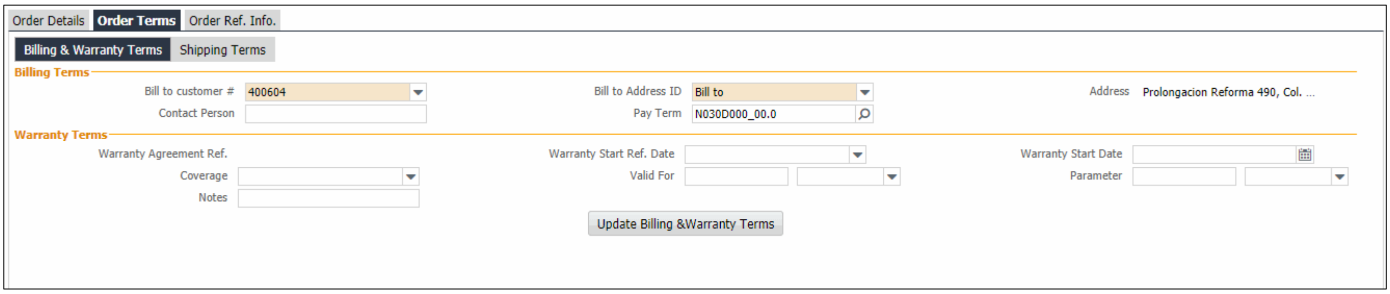


Figure 4.15 Request Details tab

1. In the **Billing Terms** section provide **Bill to Customer** number and Bill to Address ID to whom service must be billed, the point of contact in the **Contact Person** field and **Pay Term** associated with Customer Order.
2. Provide the **Warranty Start Date** from when the warranty period will be applicable, and provide the entities that will be covered under the warranty agreement, whether labour or material in the **Coverage** field and specify other details in the **Warranty Terms** group box.
3. Click the **Update Billing & Warranty Terms** pushbutton.

Shipping Terms tab

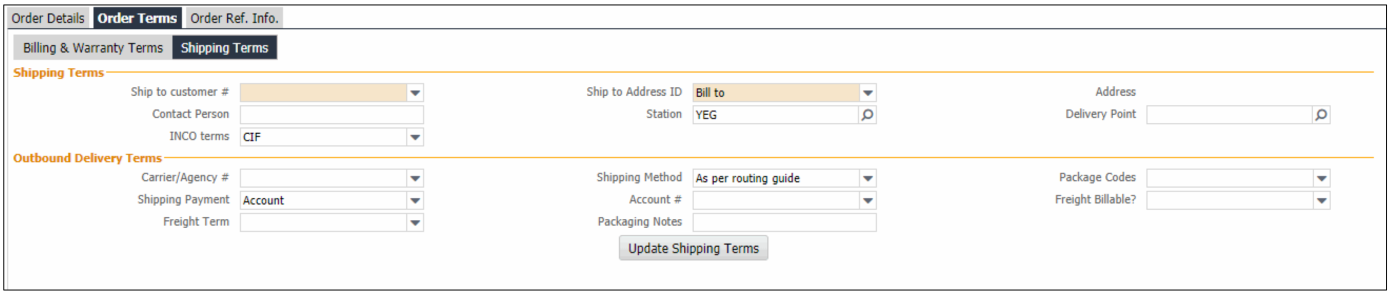


Figure 4.16 Request Details tab

1. In the Shipping Terms section provide **Ship to Customer #, Ship to Customer ID** indicating to whom the part after due maintenance must be shipped, specify the **Delivery Point** and other details.
2. Use the **INCO Terms** drop-down list box to select the standard INCO Term applicable for shipping of the part.
3. Enter details such as **Carrier/Agency #**, **Shipping Method**, **Shipping Payments** and specify the sender or recipient **Account #** and provide other details in the **Outbound Delivery Terms** section.
4. Click the **Update Shipping Terms** pushbutton.

3.1.3 Order Ref. Info

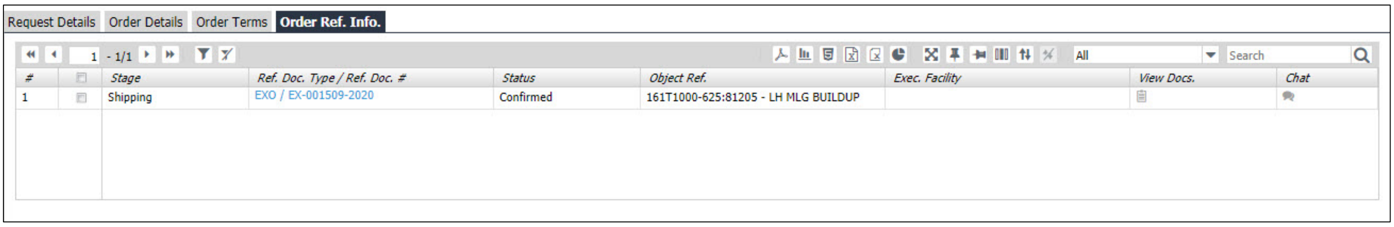


Figure 4.17 Request Details tab

1. Details of **Stage** of execution of the document, the current **Status** of the reference or execution document of the Customer Order along with details such as **Execution Facility**, **Chat** via the collaborate tool can be viewed in this tab.

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