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Sales orders, Cancellations and Replacements

Version: K3|pebblestone Cloud 1.0

Day 5 – Project Implementation Form

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## **Customer and Project Data**

|  |  |
| --- | --- |
| **Customer Name** |  |
| **Implementing Consultant** |  |
| **Date** |  |
| **Project & Activities** | Sales orders, Cancellations and Replacements |
| **Time Scheme** | We estimate a seven-hour duration to discuss the topics listed below. |

##  Attendees by Functional Area

|  |  |  |
| --- | --- | --- |
|  |  | Name of K3|pebblestone users per functional area |
| **KEY** | Key user  |  |
| **SD** | Sales Department |  |
| **PD** | Purchase Department |  |
| **WD** | Logistics / Warehouse Department |  |
| **FD** | Finance Department / Accounting |  |
| **ALL** | All K3|pebblestone users  |  |

These will be the users that will have a role in the implementation of K3|pebblestone. It is important that they attend to the sessions for their functional area. When the necessary users don’t attend, this could cause serious delays for further implementations.

##  Targets for the End of the 5th Day

* Presales and NOOS ordering
* Ordering for Distributors
* Presales plan
* Create Replacements and Cancellations

## Pre-requisites Day 5

To make sure that we cover all the topics planned for day 5, it is essential to watch the following E-learning videos and make sure that you prepare questions if you have any.

* Demo Videos:
	+ - * Sales ordering within K3|pebblestone
			* K3|pebblestone Presales Plan
			* Cancellations and Replacements within K3|pebblestone
* Online Academy
	+ - * Sales
				+ Order Type
				+ Sales Order creation
				+ Batch op and release Sales Orders
			* Purchase
				+ Cancellations and Replacements
				+ End of Season Cancellations

## Customer form Day 5 – Sales orders, Cancellations and Replacements

To deliver a clear and complete implementation within the set timeframe it is important that the tasks are completed within the estimated time.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tasks | Estimated time (mins) | Attendees on functional area | Completed | N/A |
| Answering the questions from day 4, or from watching the videos to prepare for day 5. | 30 | KEY |  |  |
| Order Type | 30 | SD |  |  |
| Create Presales orders | 30 | SD |  |  |
| Small Break | 15 |  |  |  |
| Create Presales orders | 30 | SD |  |  |
| Create NOOS order | 60 | SD |  |  |
| Lunch Break | 30 |  |  |  |
| Ordering for distributors | 30 | SD |  |  |
| Open/ Release Sales orders | 30 | SD |  |  |
| Presales plan | 30 | SD/ PD |  |  |
| Small Break | 15 |  |  |  |
| Presales plan | 30 | SD/ PD |  |  |
| Creation of Replacement and Cancellation | 60 | SD/ PD |  |  |
| Review day 5 |  |  |  |  |
| **Total hours spent**  |  **7 hours** |

|  |  |
| --- | --- |
| Additional time spent on (to be invoiced) | Minutes |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Tasks for the customer | Deadline |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Tasks for the implementor | Deadline |
|  |  |
|  |  |
|  |  |

|  |
| --- |
| Remarks |
|  |

|  |  |
| --- | --- |
| Dates |  |
| **Signature for acceptance** |  |

Disputes concerning the time spent and the subjects discussed must be announced to COMPANYNAME within 3 business days after the visit of the implementer.