



Purchase, Delivery and Returns
Version: K3|pebblestone Cloud 1.0

Day 6 – Project Implementation Form

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## **Customer and Project Data**

|  |  |
| --- | --- |
| **Customer Name** |  |
| **Implementing Consultant** |  |
| **Date** |  |
| **Project & Activities** | Purchase, Delivery and Returns |
| **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 6th Day

* Create Purchase order
* Supply planning and Receiving
* Delivery the collection to the customer
* Return Sales orders, Return Purchase orders and Credit memos

## Pre-requisites Day 6

To make sure that we cover all the topics planned for day 6, it is essential to watch the following E-learning videos and make sure that you prepare questions if you have any.

* Demo videos:
	+ - * K3|pebblestone Presales Plan
			* Purchase Order creation within K3|pebblestone
			* K3|pebblestone Item Supply Planning
			* K3|pebblestone Delivery Plan
* Online Academy
	+ - * Item Management
				+ Item Supply Planning
			* Purchase
				+ Purchase Order creation through Presales Plan
				+ Purchase Order creation
			* Logistics
			* Delivery Worksheet creation

## Customer Form Day 6 – Purchase, Delivery and Returns

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 5, or from watching the videos to prepare for day 6. | 30 | KEY |  |  |
| Purchase orders creation through Presales plan | 60 | PD |  |  |
| Small Break | 15 |  |  |  |
| Purchase order creation for NOOS items | 60 | PD |  |  |
| Supply planning | 30 | SD/ PD |  |  |
| Lunch Break | 30 |  |  |  |
| Receipt Worksheet | 30 | WD |  |  |
| Delivery Worksheet | 60 | WD |  |  |
| Small Break | 15 |  |  |  |
| How to adjust stock (using the Item Journal) | 30 | WD |  |  |
| Reversed Logistics (sales return orders) | 30 | SD/ WD |  |  |
| Creation of Sales Credit Memo’s and Posting | 30 | SD/ FD |  |  |
| Review day 6 |  |  |  |  |
| **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.