APRODA
Business Solutions by Bechtle

Process case

Aproda Equipement and Tools Solution
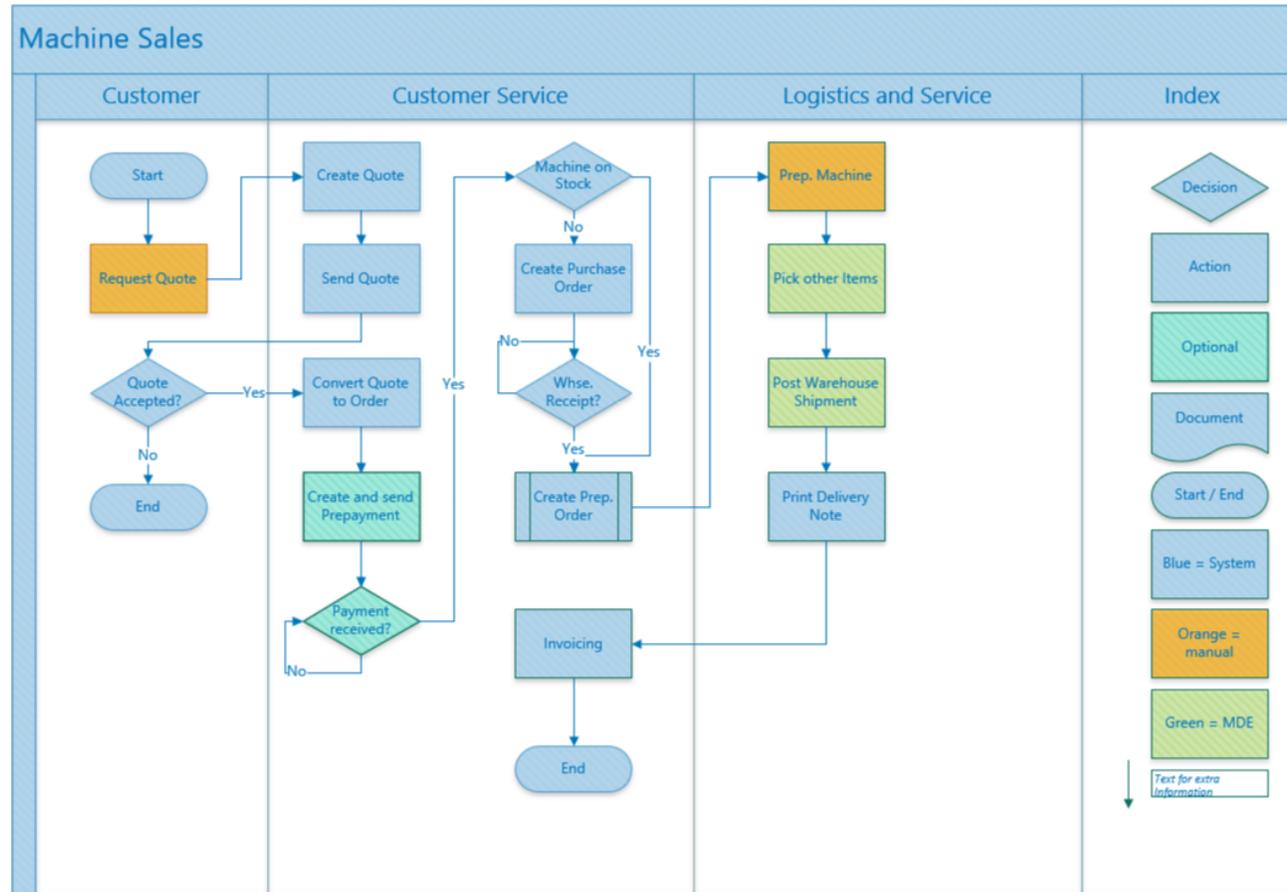
Process flow chart

Figure: Machine sales workflow

Process steps explained

Quote Process

process step 1.   Customer requests a quote

process step 2.   Quote is entered in Business Central

1. Step: in the role centre choose the required Business type and click on "new quote"
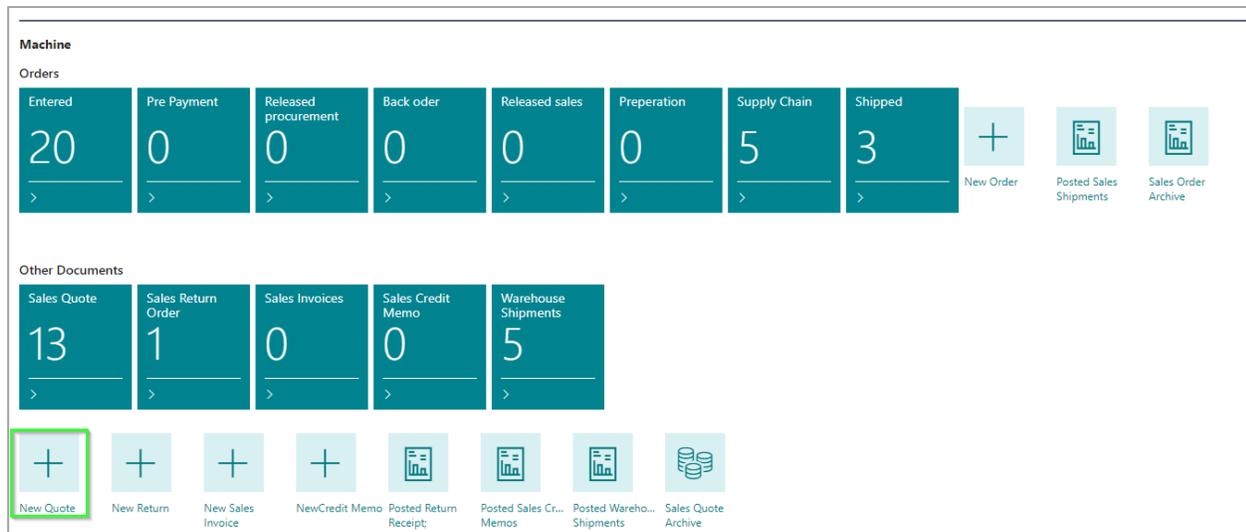

Figure: Role centre machine

Process steps explained

Quote Process

2. Step: The Header of the sales quote consists of customer data.

Figure: Machine quote header

3. Step: on the lines the items are entered, two first fields are item type and no. MS ADP

Figure: machine quote line

Process steps explained

Quote Process

4. Step: *Confirm the «create Quote-Machine» with yes*

Figure: confirmation

5. Step: *Fill out the rest of the quote line*

6. Step: *Quote is ready press release*

Figure: release quote

process steps explained

Quote Process

7. Step: Press Print / Send to create a PDF and send it to the customer

process step 3. Customer requests a quote
process step 4. Quote is entered in Business Central
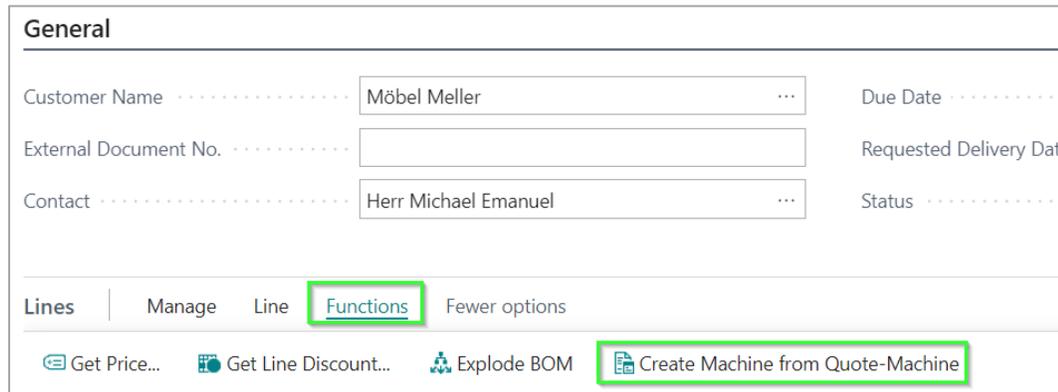process step 5. Process ends
Process step 6. 3 = yes

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process steps explained

Convert to Quote to Order

process step 7. convert quote into an order

1. Step.   Create machine from quote machine via functions

Figure: Convert Quote Machine to Machine

2. Step.   Confirm with yes
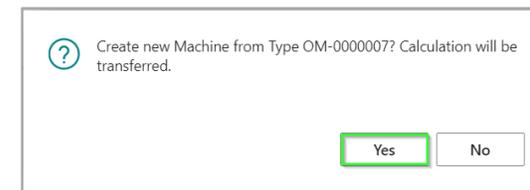
Figure: Confirmation quote Machine

process steps explained

Convert to Quote to Order

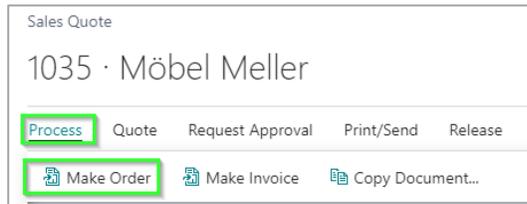*3. Step.*   *Via «Process», «Make Order» an order is created by the system*

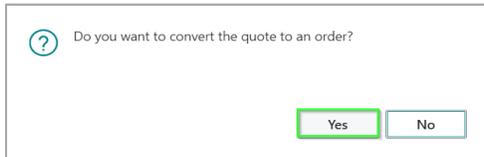*Figure: convert quote to order*

4. Step.   Press yes

Figure: confirmation conversion

process steps explained

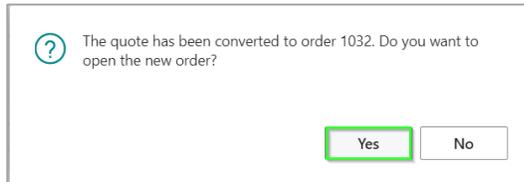**Convert to Quote to Order**

5. Step.   Press yes

The quote has been converted to order 1032. Do you want to open the new order?

Yes   No

Figure: confirmation 2

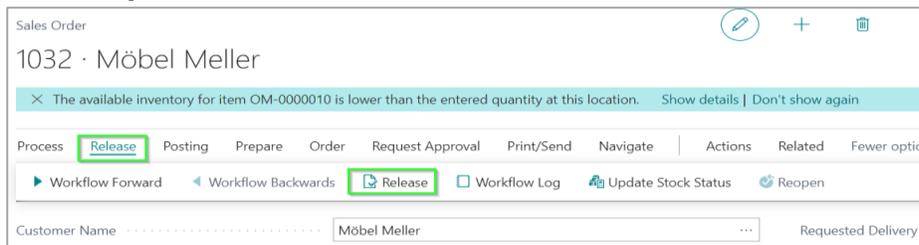*6. Step.   Order is created fill out the required fields and press Release and Update stock Status*
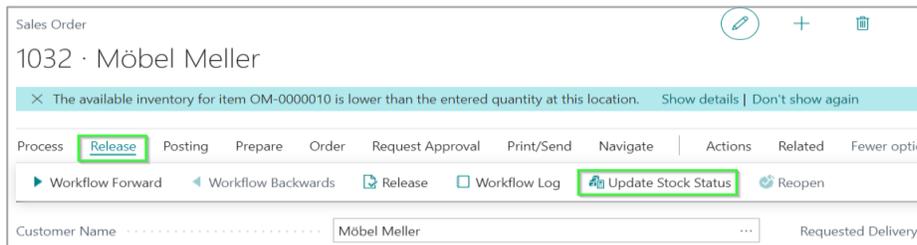
Sales Order

1032 · Möbel Meller

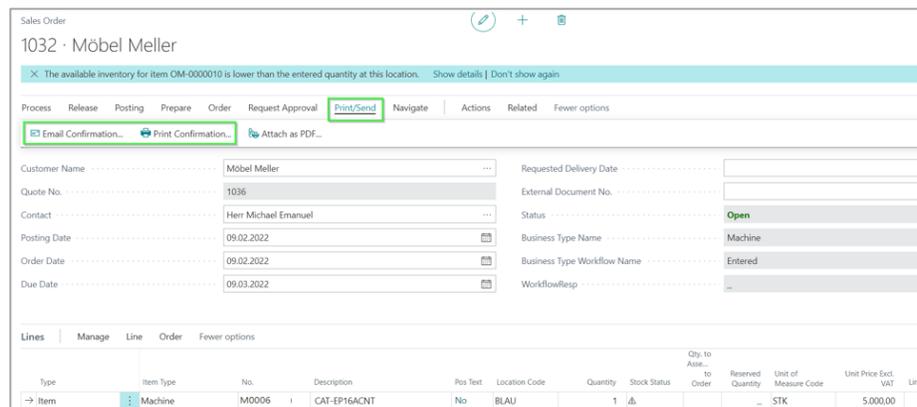✕ The available inventory for item OM-0000010 is lower than the entered quantity at this location.   Show details | Don't show again
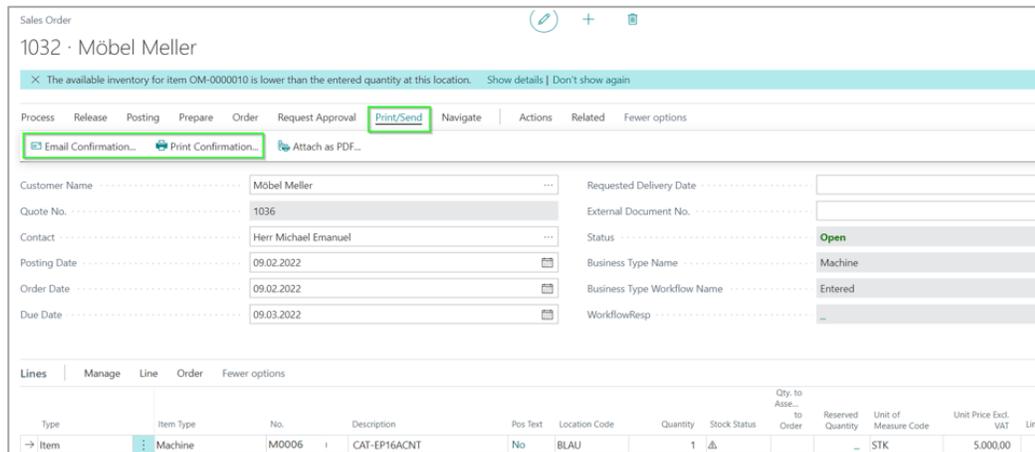
Process   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate   Actions   Related   Fewer optio

▶ Workflow Forward   ◀ Workflow Backwards   Release   Workflow Log   Update Stock Status   Reopen

Customer Name . . . .   Möbel Meller   Requested Delivery

Figure: Update Stock Status

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process steps explained

Convert to Quote to Order

7. Step.   Now Press Release and Release

Figure: update stock status

8. Step.   Send Order Confirmation via email or print

Figure: send order confirmation

process steps explained

Convert to Quote to Order

7. Step.   Now Press Release and Release

Figure: update stock status

8. Step.   Send Order Confirmation via email or print

process step 8. machine or inventory?
process step 9. 5 = n

Figure: send order confirmation

process steps explained

Create Purchase Order and Purchase Receipt

process step 10. Create Purchase Order

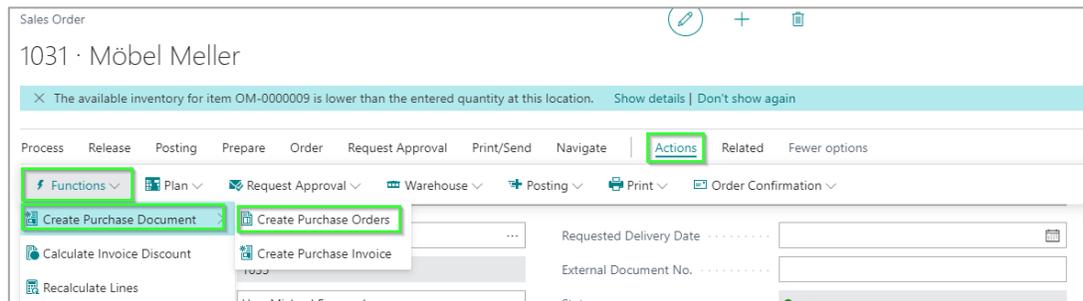*1. Step: Click «Actions», «Function», «Create Purchase Documents», «Create Purchase orders»*

Figure: Create PO from SO

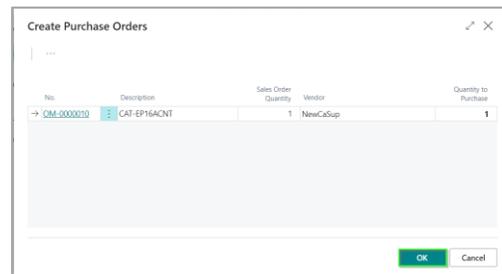*2. Step: Click OK to create the purchase order*

Figure: Confirm PO creation

process steps explained

Create Purchase Order and Purchase Receipt

3. Step: Enter purchase price and release the purchase order

Figure: PO

process step 11. is the machine delivered?
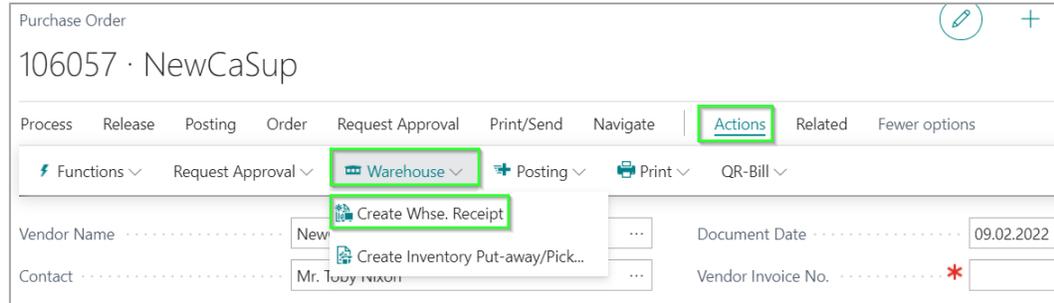process step 12. 9 = no
process step 13. back to step 9
process step 14. either 9 or 11 = yes

process steps explained
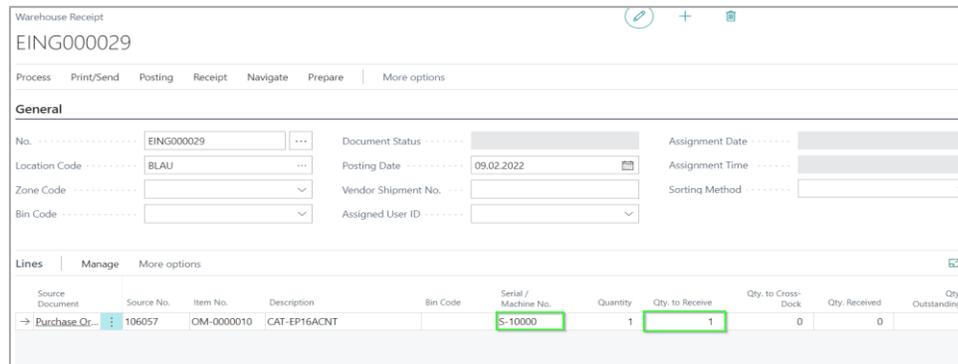
Create Purchase Order and Purchase Receipt

1. Step: Create Whse. Receipt via «Actions», «Warehouse», «Create Whse. Receipt»

Figure: Create Warehouse Receipt

2. Step: Fill out the serial number of the received machine and Qty. to Receive

Figure: Warehouse Receipt

process steps explained

Create Purchase Order and Purchase Receipt

3. Step: Post Warehouse Receipt via «Posting», «Post Receipt»

Figure: Post Warehouse Receipt

4. Step: Confirm with Yes

Figure: Confirmation Warehouse receipt
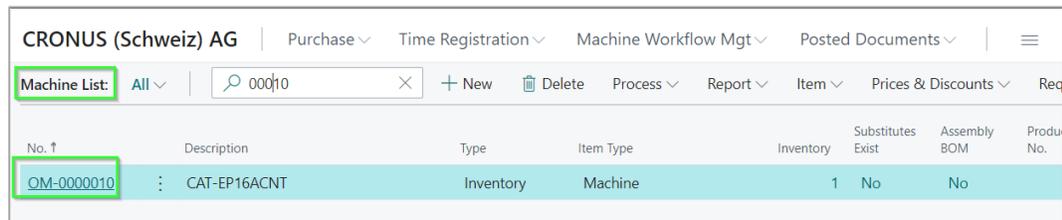
5. Step: Press OK

Figure: Confirmation Warehouse receipt 2

process steps explained

Create Preparation Order

process step 15. create a preparation order

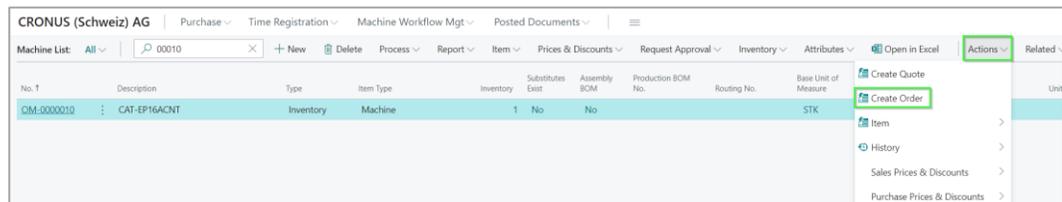*1. Step: Select machine in the machine list*

Figure: Machine list

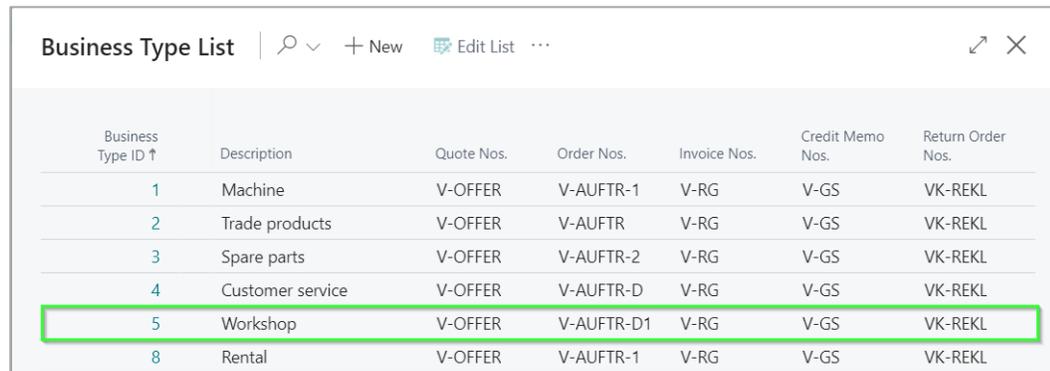*2. Step: click actions → create order*

Figure: create preperation order

process steps explained

Create Preparation Order

process step 15. create a preparation order

3. Step: select business type workhops

Figure: Select business types

4. Step: Click OK

process steps explained

Create Preparation Order

5. Step: Fill out customer and machine fields

Figure: preperation order

6. Step: Change the bill-to-customer to an internal customer no. the preperation order is for internal use
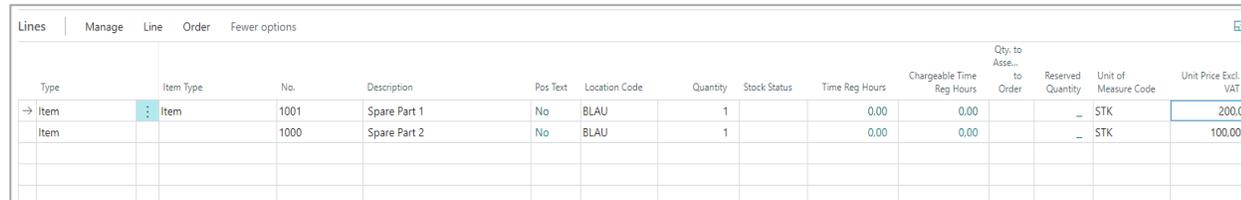

Figure: change customer on prep. order

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process steps explained

Create Preparation Order

7. Step: Add required spare parts to the preparation order

Lines	Manage	Line	Order	Fewer options												
	Type		Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Time Reg Hours	Chargeable Time Reg Hours	Qty. to Asse... to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT
→	Item	⋮	Item	1001	Spare Part 1	No	BLAU	1		0,00	0,00		_	STK	200,00
	Item			1000	Spare Part 2	No	BLAU	1		0,00	0,00		_	STK	100,00

Figure: Change customer on Prep. Order

8. Step: Move order to next step of the Workflow

Sales Order

104033 · Möbel Meller

Process   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate | Actions   Related

▶ Workflow Forward   ◀ Workflow Backwards   Release   Workflow Log   Update Stock Status   Reopen
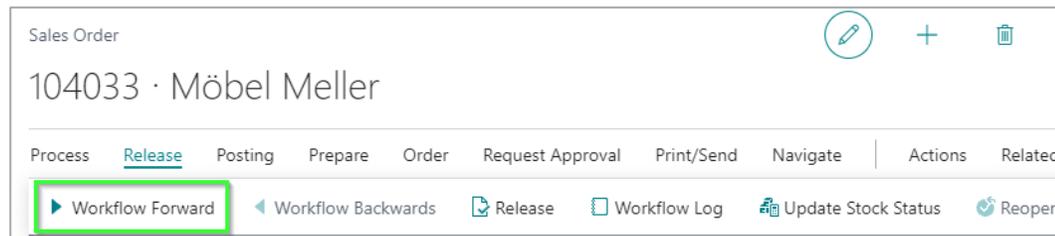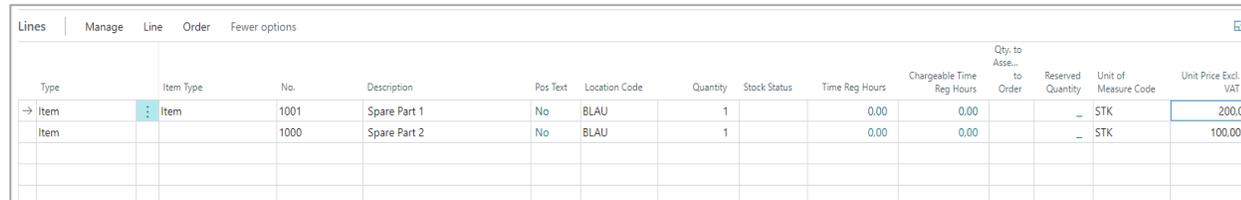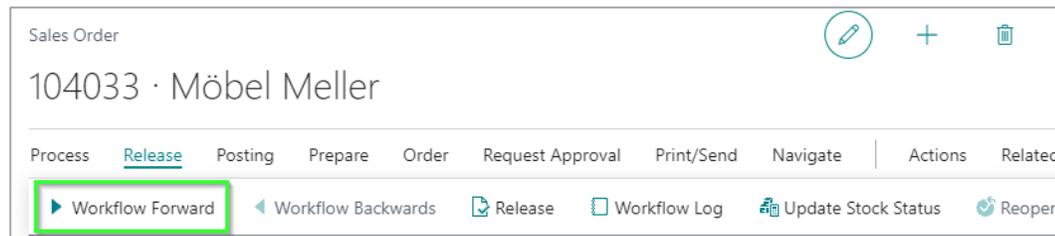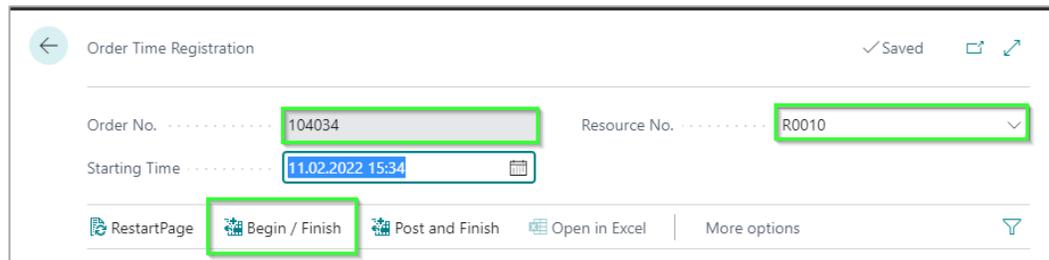
Figure: Workflow Forward

9. Step: Add Work time to prep. order

10. Step: Role Center → Time Registration → Order Time Registration

process steps explained
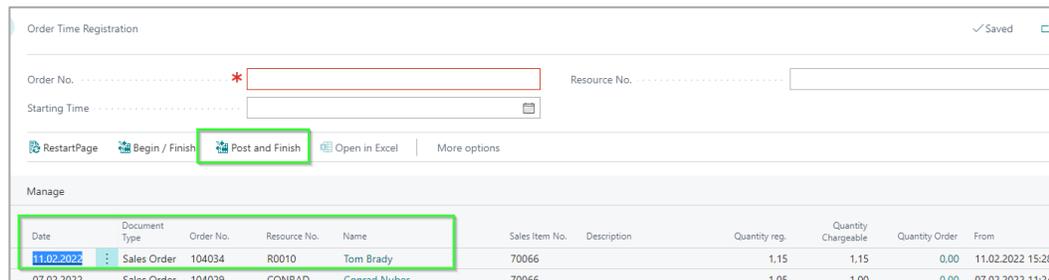
Create Preparation Order

7. Step: Add required spare parts to the preparation order

Figure: Change customer on Prep. Order

8. Step: Move order to next step of the Workflow

Figure: Workflow Forward

9. Step: Add Work time to prep. order
10. Step: Role Center → Time Registration → Order Time Registration

process steps explained

Create Preparation Order

11. Step: Add Sales Order No & Resource No. and press Begin / Finish

Figure: Order time Registration

12. Step: Finish work by clicking Post and Finish

Figure: Finish time registration

process steps explained

Create Preparation Order

13. Step: Create line on order: Open the order and click assist button

Figure: Assist Button

Figure: Registered time on Sales Order

process step 16. Pick remaining items & post preparation order

process step 17. Post warehouse shipment of the machine order

process steps explained

Create Preparation Order
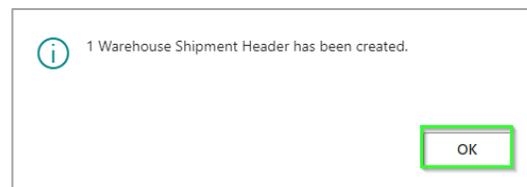
process step 17. Post warehouse shipment of the machine order

1. Step: Actions → Warehouse → Create Warehouse Shipment
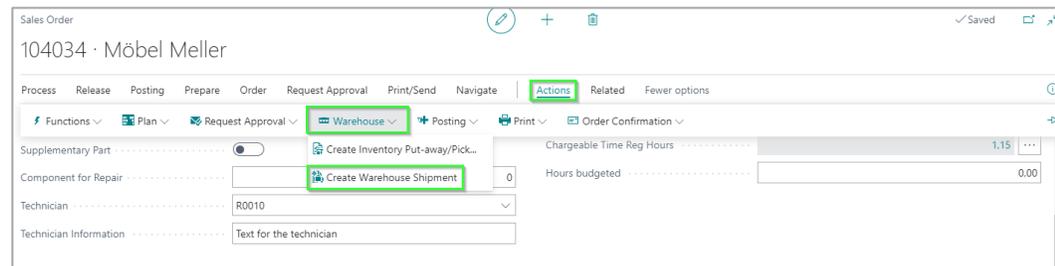
Figure: Create warehouse shipment

2. Step: Press OK

Figure: Confirmation

process steps explained

Create Preparation Order

3. Step: Post Warehouse Shipment

process steps explained

Create Preparation Order

4. Step: Check the serial number

Figure: Machine Warehouse Shipment

process steps explained

Create Preparation Order

5. Step: Post Warehouse Shipment

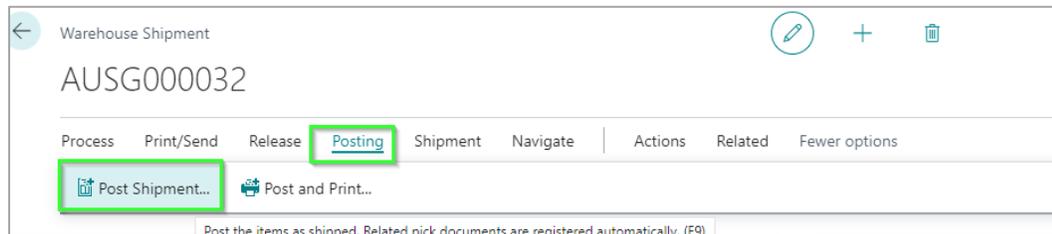*Figure: Post Warehouse Shipment*

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process steps explained

Create Preparation Order

process step 18. Print Delivery Note

1. Step: Open Posted Shipment

Figure: Open Shipment

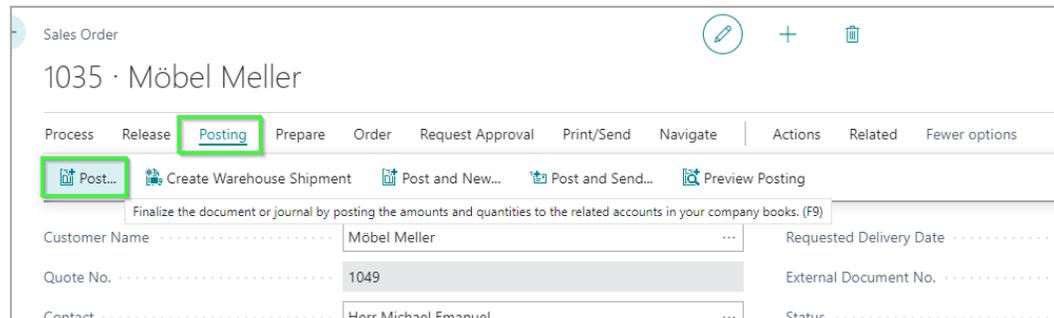*2. Step: Open Posted Shipment*

Figure: Print Delivery Note

process steps explained

Create Preparation Order

process step 19. Invoice Sales order

1. Step: Post the Sales Order

Figure: Post Sales Order

2. Step: Select invoice and press OK
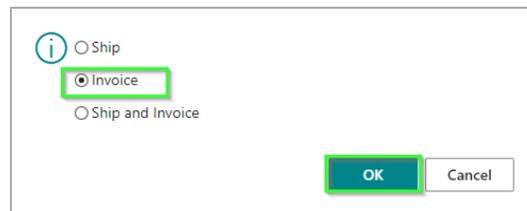
Figure: Confirm Invoicing

process step 20. End