**From:** Jim Maloy
**Sent:** Wednesday, July 03, 2013 1:43 PM
**To:** Judy Ascensao; Susan Parker; Steven Borowick; Owen Richardson
**Subject:** RE: Quote/Sales Order Ackn Mtg - 7/2/13

My feeling is that we send them individual acknowledgements with the actual order number intact.   For reference we could add a “temporary” order header comment that states: “This order is part of Master Order# 12345”.    Again, this is a little odd but I think this will save us some time at the expense of this dying breed and isn’t terrible solution.

**From:** Judy Ascensao
**Sent:** Wednesday, July 03, 2013 1:29 PM
**To:** Jim Maloy; Susan Parker; Steven Borowick; Owen Richardson
**Subject:** RE: Quote/Sales Order Ackn Mtg - 7/2/13

John was just asking about bundling on Avante ackn forms.  If we send separate ackn for each individual order#, what prints in the order# box?  The real order# or the master order#?  If real order#, this is different than web version.  If master order#, it will require a change to Avante form, and it would mean they could get multiple faxed ackn for different orders all with the same master order#.  I was going to bring this up at today’s meeting.

Judy

**From:** Jim Maloy
**Sent:** Wednesday, July 03, 2013 1:14 PM
**To:** Susan Parker; Judy Ascensao; Steven Borowick; Owen Richardson
**Subject:** RE: Quote/Sales Order Ackn Mtg - 7/2/13

Some notes in green below:

**From:** Susan Parker
**Sent:** Tuesday, July 02, 2013 4:35 PM
**To:** Judy Ascensao; Jim Maloy; Steven Borowick; Owen Richardson
**Subject:** RE: Quote/Sales Order Ackn Mtg - 7/2/13

This is awesome, thank you so much for transcribing your notes. Some comments embedded below. I will post consolidated notes to wiki.

**From:** Judy Ascensao
**Sent:** Tuesday, July 02, 2013 2:54 PM
**To:** Susan Parker; Jim Maloy; Steven Borowick; Owen Richardson
**Subject:** Quote/Sales Order Ackn Mtg - 7/2/13

Here’s what I took away from today’s meeting about Quote/Sales Order Ackn:

1. Sharing an Item is the only process that triggers a Quote Acknowledgement.  Possibly add a User Preference to automatically send a quote acknowledgement whenever a quote is created (save it, share it, put into cart)
2. Checkout is the only process that triggers a sales order acknowledgement.
3. Quote/Order Ackn faxes – Only when c/e is working on behalf of a customer who doesn’t accept emails, send a faxed acknowledgement using Avante Optio routines in it’s current format
4. Internal Sales Rep copy of quote ackn – Owen will speak with Ladd to see how he wants to handle.  Possibilities are:
	1. We send the sales rep a quote ackn copy whenever a quote is created  OR
	2. We write an ASCII report with filters where the sales reps can find out info about their customer’s quotes on demand
5. Quote into Saved Items: Creates Quote, Saves it, no ackn email sent, send copy to sales rep (if that’s what we decide)
6. Sharing a Quote: Creates Quote, sends emailed ackn in new format from the web, Auto Save to SavedItems if hasn’t been saved yet, send copy to sales rep (if that’s what we decide)
7. Quote into Cart: Creates Quote, Not auto saved, send copy to sales rep (if that’s what we decide)
8. The Avante Quote Ackn Form will be left alone.  Will continue to be used for NS Make/Buy Quotes and to print multiple quotes (by Tina/Marc).  Possibly warn the user if they are trying to send non-NS quotes???
9. I will check to see if there are sales contacts that don’t have email addresses on file.  This could be a problem if c/e has to work on behalf of a contact.  This is also a known problem for NEPB customers, who don’t have sales contacts.  Could we give c/e a way to work on behalf of someone without an email address?
10. Sales Order Ackn – from checkout, will send new web version of sales order ackn including bundling.  Order changes will be done on Avante.  When order is saved, the c/e rep will be asked if they want to send acknowledgement (they may have other order changes to do for the same master order#).  If so, they will be taken to Order History on the web and can re-send the order ackn.  It will show the most recent order info.
My understanding of this was a little different. I thought that when CE is done with all changes to a master order, a new acknowledgment would just go out automatically in the new web format) I do not think they would be taken to Order History in order to generate an ack. However, Order History would now show in place of the original order ack, the new order ack reflecting the changes.

I agree with Susan;  after the change is made in Avante it should ask whether the acknowledgement should be sent (making sure all changes for the bundle are complete) and then sent it to the fax.  It shouldn’t have to take them back to web.

If customer doesn’t accept emails, the web will call Avante Optio order ackn to fax it. \*\*how will Avante order ackn know to fax all orders under the master order # ???

Are we all okay with the fact that fax customers will get separate acknowledgements for each order created rather than a bundled version.  This is a little clumsy but I think a necessary evil if we want to avoid creating an Optio version of a bundled acknowledgement.    If so, the Avante system will fax all individual acknowledgments associated with the Master Order when a change is made.

1. Sample Orders and NS Make/Buy Orders will get Avante order acknowledgements (fax or email).

Thanks,



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**Judy Ascensao** | **Senior Systems Analyst** | **LADDAWN,** 155 Jackson Road**,** Devens, MA  01434-5614

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