# LAWSON



# U.S. Sales Procedures Training Guide

designed by Rose Marie Pohnson

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Welcome to Lawson M3 U.S. Sales Procedures Training!

#### Purpose

The purpose of Lawson M3 U.S. Sales Procedures Training is to provide CSRs step-by-step procedures in:

- Accessing Lawson M3
- Understanding Item Master Procedures
- Sending Requests to Codification/Engineering
- Creating Customer Contact information
- Generating Customer Blanket Agreements (LTAs)
- Creating and Printing Customer Quotes
- Creating Customer Orders
- Handling Follow-Up Procedures
- Cancelling and Re-Scheduling Orders
- Understanding Codification/Engineering Procedures

#### Scope

Lawson's M3 Enterprise Management System is designed to support organizations like ABC Corporation considering resources are constrained; processes are complex; and the company is international in scope. **M3** which stands for **Make**, **Move**, and **Maintain** provides a robust, integrated enterprise application suite covering many of the corporation's core and supporting processes including Financial Management, Customer Relationship Management, Manufacturing, Supply Chain Planning, Supply Chain Execution and Service & Maintenance.

#### How to Use this Guide

The **Lawson M3 U.S. Sales Procedures Training Guide** is designed for hands-on, instructor-led training, containing screen shots (as below) which display most step-by-step functions to enhance the training experience as well as act as a reference material.

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HS186963	120	1865	SETUP	Training / Meeting	and and and	Dame Md
H\$157445	130	464	RUN	Lab	Retroit Corp.	Pagest Ath
H\$179213	130	1761	SETUP	Gauges	failed into	Figure Add
H\$190805	240	2569	SETUP	Rework	Arrest Map	Fame Md
H\$188137	140	NA	RUN	And I found	Antal Stop	Fame Mb
subted labo				Contract Contract		

Step tables, as displayed below, provide step-by-step action appearing in the 'Step' section. An explanation of each action, including Notes, Important Notes and Example sections appear in the 'Result' column. Where explanations are not necessary, the Result section shall remain blank.

Step	Result

# Module 1: Understanding Item Master Procedures

#### Accessing the Quotes Screen



Step	Result
1. <b>Open</b> the M3 desktop.	The M3 desktop is displayed.
<ol> <li>In the SEARCH field (upper-right corner), type "mforms://OFS100".</li> </ol>	The QUOTES (OFS100/B1) screen appears.

### Sending a Request to Codification/Engineering

13 Quotes - C	OFS100/B1									
Actions 👻 Op	otions 👻 Related 👻	Tools <sup>-</sup>	- D	ß	• • <u>•</u> [0]	8	č			
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Commercial s	strr: [TOR▶]				Status:	l	<u> </u>			
RFQ:										
Oueta e	PEO	Com	Customor	Ent dt	Follow up rag	uo Sta				
	NFQ	Com	Customer	Entat	ronow up req					
0090054	ESS ARE OFFICE SCOP	TOP	57151	111709		00				
0089094	P35 ABE OF5100-5C05	TOR	100014	042309		100				
0089091	EHEH	TOR	60138	050109					7	1
0089092	23456TEST	TOR	59123	050709				Related Options	Print CTRL+6	
0089093	22222TEST	TOR	58921	050709		4		Change K	Close quote CTRL+8	
0089094	4444TEST	TOR	60134	050709		00		Сору	Historical CTRL+11	
0089095		TOR	58422	050709	050909	33		Delete	Assistance CTRL+12	
0089096	33366TEST	TOR	56211	050709		44		Display	Quotation lines CTRL+15	
0089097		TOR	60138	051209	052209	33		Linked Documents		,
0089098		TOR	00001	051909		00		Conv To Clipboard		
0000000		TON	00001	051000				Restore column widths		
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Step	Result
1. In the <b>QUOTES</b> ( <b>OFS100/B1</b> ) screen, <b>select</b> a quote to send to Codification/Engineering.	The selected quote is highlighted. <b>Note:</b> Status of Quote lines: 20 = Item does not exist in M3 30 = Manufacturing warehouse has not been identified 40 = No Cost or Lead time 60 = No Sales Price
	70 = Line completed 90 = Line closed
2. <b>Right-click</b> on selected quote, <b>select</b> <b>RELATED OPTIONS</b> , then <b>select PRINT</b> .	The QUOTATION PRINT screen (OIS180/E) appears.

### Sending a Technical Assis to Codification/Engineering

M3 Quotation. print - 0	DFS180/E		_						
Actions 👻 Options 👻	Related 👻 Tools 🔹		8 🧭	Ľ۵	[D]	$\bigotimes$	Ğ	E	
Quote number:	0089090								
	_								
Quotation draft:	0								
<ul> <li>Technical assis:</li> </ul>									
Quotation:	0			_	_			_	
Technic answer:	0	Warehouse:			Þ				
Сору:	0								
Daman	9								
r Paper:	•								
Fax:									
Mail:							N		
							N		
	· ·								

Step	Result
1. In the QUOTATION PRINT screen (OIS180/E), click the TECHNICAL ASSIS check box.	The TECHNICAL ASSIS check box is selected.
2. In the <b>WAREHOUSE</b> field, <b>select</b> code and <b>press</b> the <b>delete</b> key.	The WAREHOUSE code is deleted.
3. Click the PAPER check box.	The PAPER check box is selected.
4. Click the MAIL check box.	The MAIL check box is selected.
5. Click the NEXT button, then click the CLOSE button.	Quote is sent to Codification/Engineering.

# Module 2: Entering Customer Contact Information

M3 Contacts data-base	OFS130/B	
Actions 🗸 Options 🗸	Related 🗕 Tools 🗕 🛐 🕅 🎽 🦉	¢ 🖻
Customer:	Create 60138	
Contact person	Fonction Company/departm	

#### Opening the Contacts Database Screen

Step	Result
1. To open the <b>CONTACTS DATABASE</b> screen ( <b>OFS130/B</b> ) <b>pavigate</b> to the M3 desktop. In the	The CONTACTS DATABASE screen appears.
SEARCH field (upper-right corner), type mforms://ofs130.	
2. In the <b>CUSTOMER</b> field, <b>type</b> customer number.	Customer number and name appears.
If the customer number is unknown, <b>enter</b> customer name in the adjoining <b>NAME</b> field, then <b>press ENTER</b> . <b>Click</b> name to select, then <b>click</b> the <b>SELECT</b> button.	The customer ID appears in the CUSTOMER field.
3. In the <b>CONTACT PERSON</b> field, <b>type</b> name.	The name appears.
4. Click the CREATE button.	<b>Note</b> : If a customer already exists, M3 will display the following message " <i>The record already exists</i> ".

### Entering Information in Contact Information Fields

Actions   Ontions	
Customer:	60138 BOEING COMMERCIAL AIRPLANE
Contact person:	JOHN SMITH
Name:	Sales
Company/departm:	Sales
Telephone no 1:	310400900
Mobile phone:	310700900
Facsimile no:	
E-mail address:	john.smith@boeing-abc.com
	Ν
Comment:	

Step	Result
1. In the CONTACTS DATABASE (OFS130/E)	Note: Review typed information to ensure
screen, <b>type</b> information in the <b>NAME</b> ,	accuracy.
FUNCTION, COMPANY/DEPARTMENT,	
TELEPHONE NUMBER, MOBILE NUMBER,	
FAX NUMBER, E-MAIL ADDRESS and	
COMMENTS fields.	
2. Click the NEXT button.	The CONTACT DATABASE (OIS060/B)
	appears.