

# LAWSON



# M3

## **U.S. Sales Procedures Training Guide**

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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:

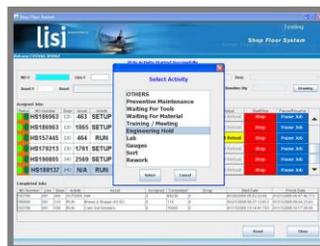
- Accessing Lawson M3
- Understanding Item Master Procedures
- Sending Requests to Codification/Engineering
- Creating Customer Contact information
- Generating Customer Blanket Agreements (LTAs)
- Creating and Printing Customer Quotes
- Creating Customer Orders
- Handling Follow-Up Procedures
- Cancelling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



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

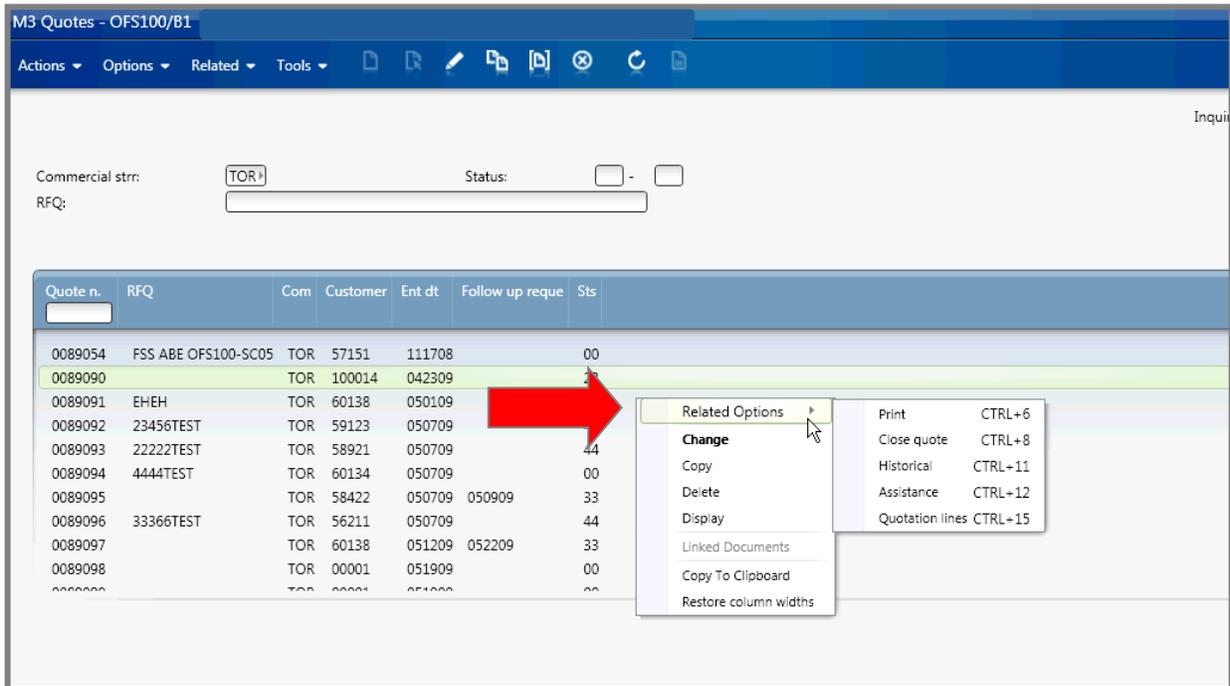
## Module 1: Understanding Item Master Procedures

### Accessing the Quotes Screen



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

## Sending a Request to Codification/Engineering



Step	Result
1. In the <b>QUOTES (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 RELATED OPTIONS</b> , then <b>select PRINT</b> .	The QUOTATION PRINT screen (OIS180/E) appears.

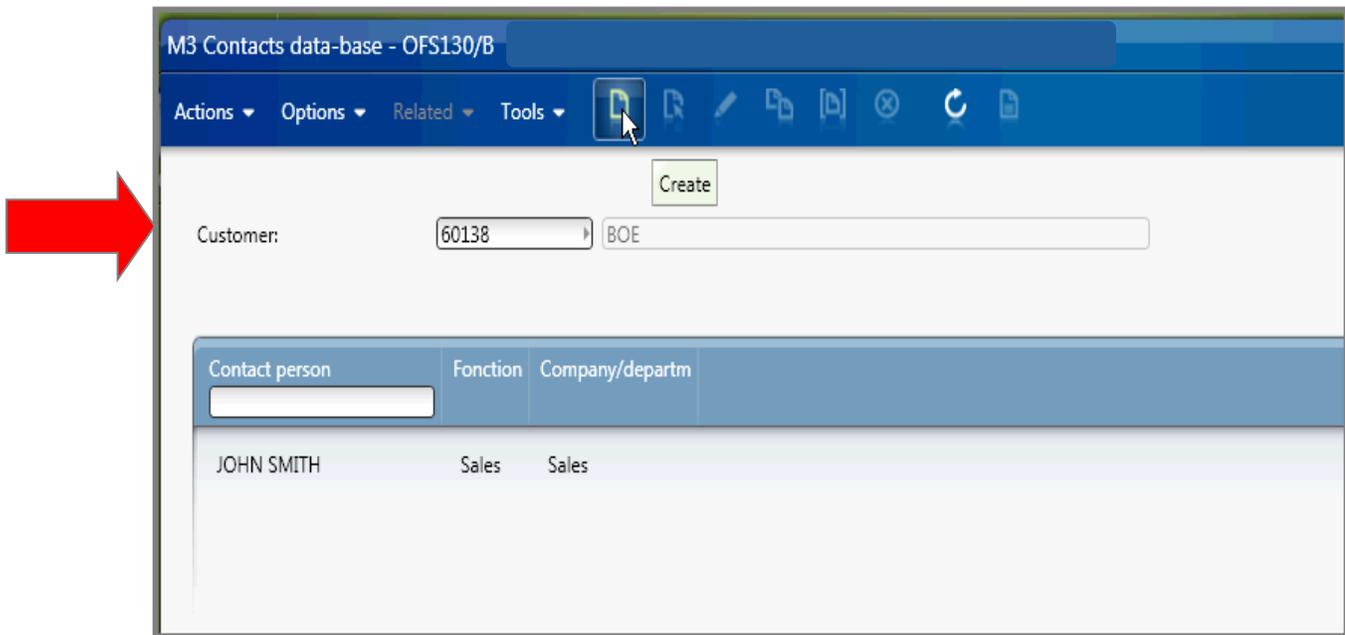
## Sending a Technical Assis to Codification/Engineering

The screenshot shows the 'M3 Quotation. print - OFS180/E' window. The 'Quote number' is 0089090. The 'Technical assis' checkbox is checked. The 'Warehouse' field is empty. The 'Paper' and 'Mail' checkboxes are also checked. Red arrows point to the 'Technical assis' checkbox, the 'Warehouse' field, and the 'Paper' and 'Mail' checkboxes.

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

## Module 2: Entering Customer Contact Information

### Opening the Contacts Database Screen



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

## Entering Information in Contact Information Fields

The screenshot shows the 'M3 Contacts data-base - OFS130/E' window. The interface includes a menu bar with 'Actions', 'Options', 'Related', and 'Tools'. The main area contains several input fields:

- Customer: 60138 BOEING COMMERCIAL AIRPLANE
- Contact person: JOHN SMITH
- Name: John Smith
- Fonction: Sales
- Company/departm: Sales
- Telephone no 1: 310400900
- Mobile phone: 310700900
- Facsimile no: (empty)
- E-mail address: john.smith@boeing-abc.com
- Comment: (empty)

A red arrow points to the 'Name' field. A red bracket on the right side groups the 'Name', 'Fonction', 'Company/departm', 'Telephone no 1', 'Mobile phone', 'Facsimile no', 'E-mail address', and 'Comment' fields.

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