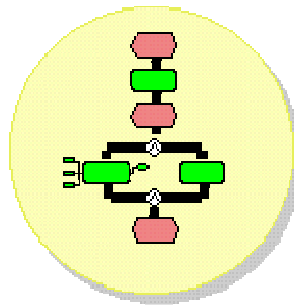


Business Process Modeling

Part II: Template Design and Example

Business Process CM: Customer Order Management



This paper (Part II) proposes a template design and illustrates the process of Customer Order Management as an example.

*Part I of **Business Process Modeling** introduces the concept of business modeling: an approach to describe organizational business processes using SAP and other software.*



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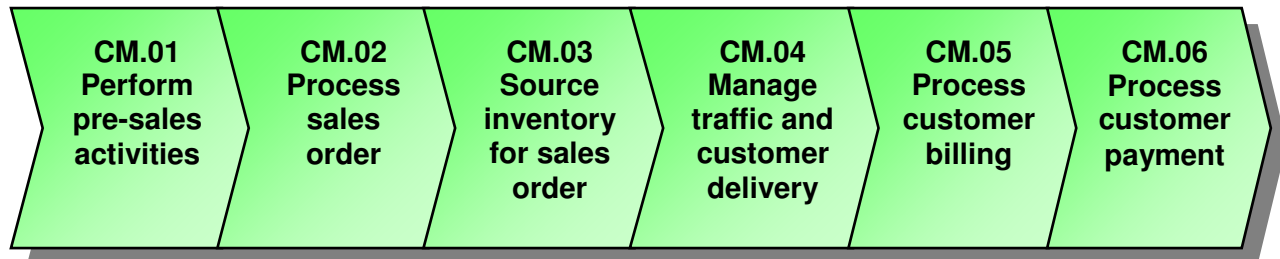
Business process CM: Customer order management¹

Process overview

The customer order management process involves primarily the Sales and Distribution (SD) module in SAP, but also interfaces with other modules. It is also known as the “pre-sales through customer payment” business process. Major activities within the process include creating sales orders, confirming stock availability, picking and shipping goods, invoicing customers, and posting customer payments.

Business process chain

The following diagram illustrates the business process at a high level for managing customer orders, including the allocation and de-allocation of stock to a sales order:



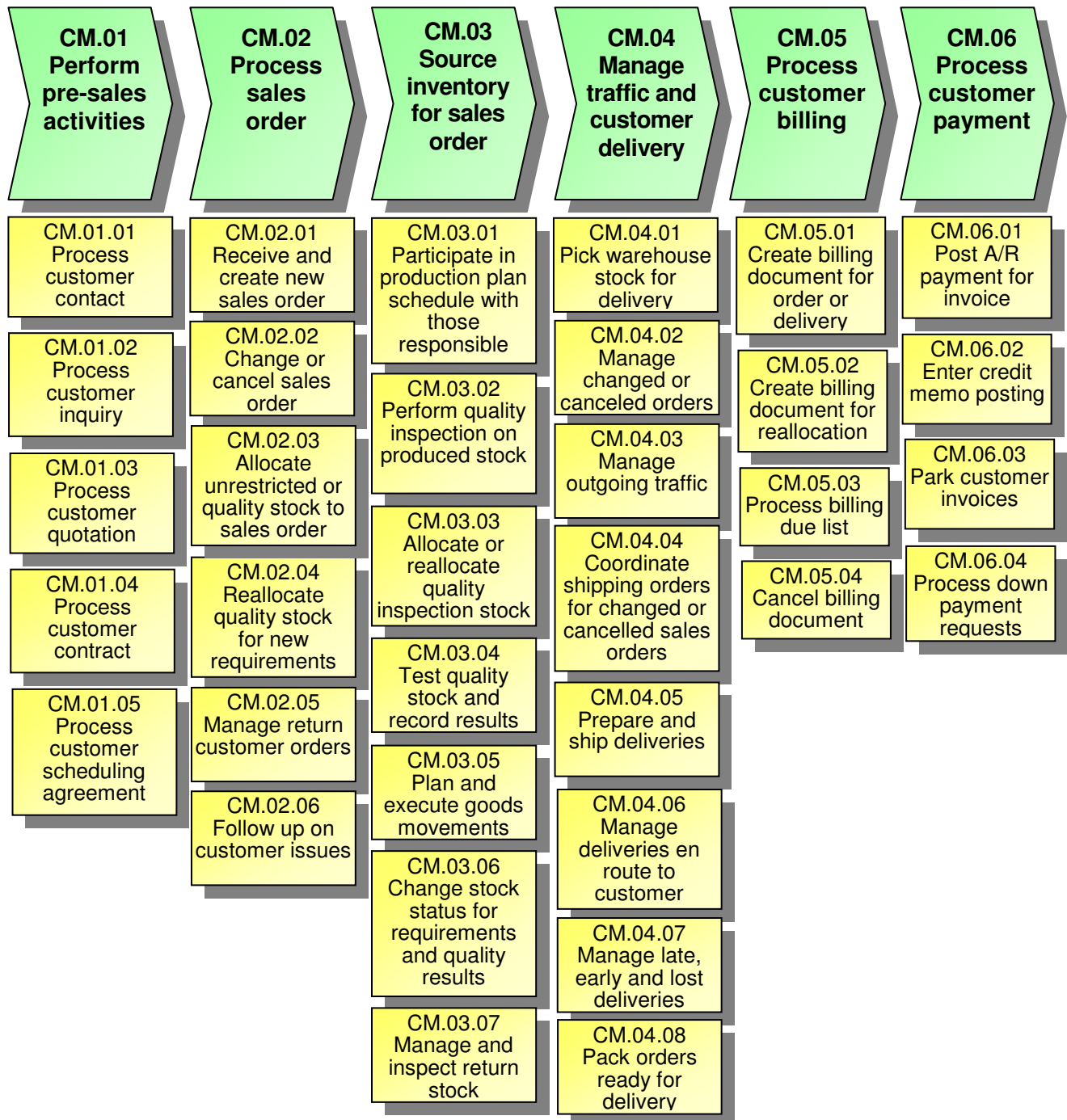
Business sub-processes for customer order management

- CM.01. Perform pre-sales activities (respond to inquiries, negotiate outline agreements)
- CM.02. Process sales order (management of customer requests and issues)
- CM.03. Source inventory for customer request (warehousing, stock movements and quality inspections)
- CM.04. Manage traffic and customer delivery (dispatching stock movements and coordinating customer returns)
- CM.05. Process customer billing (invoicing)
- CM.06. Process customer payment (posting in accounts receivable)

¹ Note that the activities and diagrams used in this document are examples only and do not necessarily reflect best business practices. Please refer to the preceding document *Part I: Concept Paper and Introduction* for more background information on business modeling.

Business activities for customer order management

The following diagram lists all the business activities under the main sub-processes for allocating and de-allocating stock for a customer order. The activities do not necessary work in sequence, can be performed by any number of SAP transactions and may contain tasks that can be performed by a number of users in different departments. It is also possible that some activities do not require SAP transactions to function.



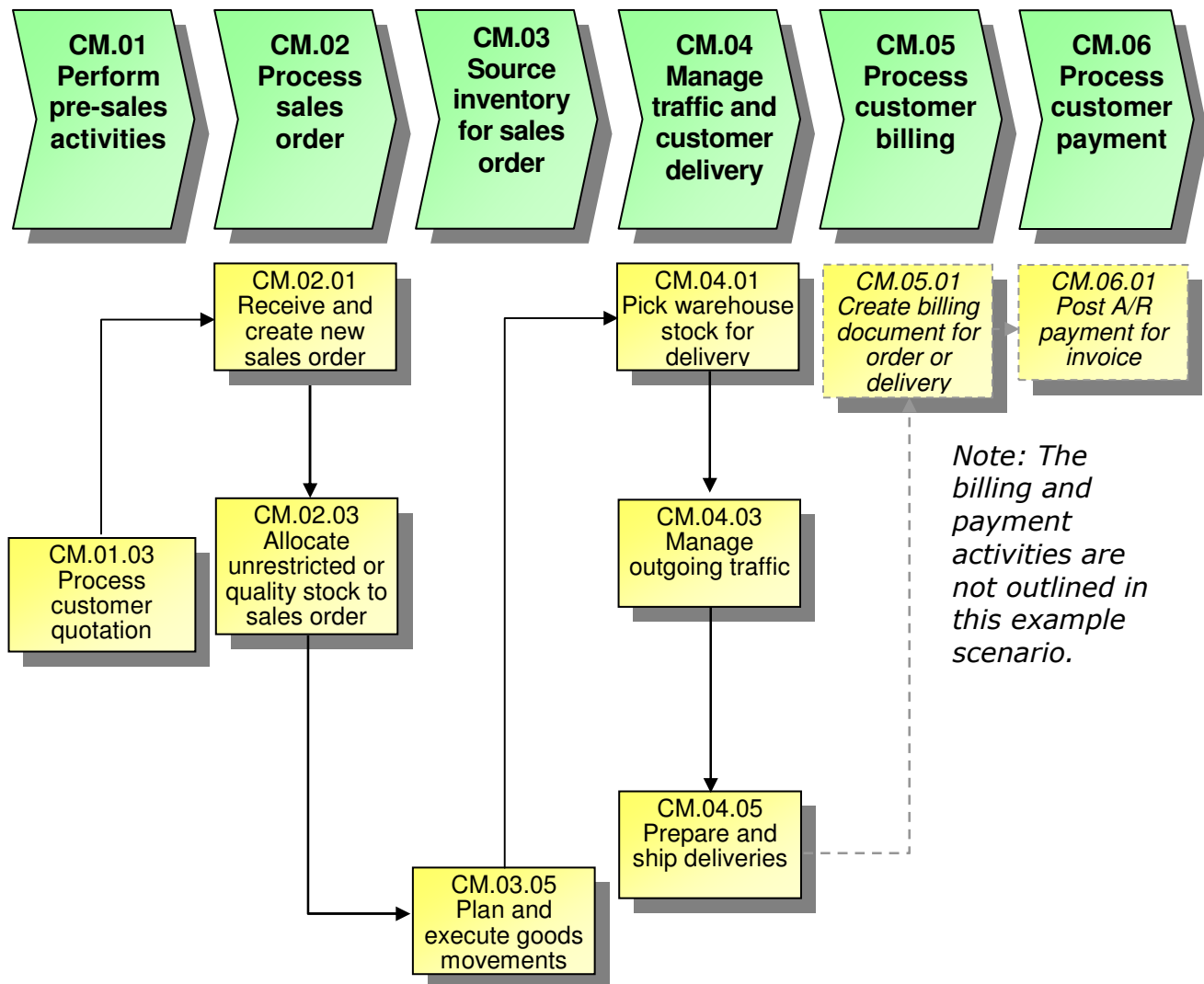
Business scenario CM-1: Customer order life cycle with no exceptions

Scenario overview

The business process to manage a customer order is used to receive customer orders from the customer, provide information to the customer about products and to manage customer issues. This business process also manages orders that need to be returned or cancelled. The business scenario for the customer order life cycle with no exceptions is illustrated within this process, by way of example. Several other scenarios are possible within the process (that is, with exceptions).

Scenario flow diagram

This diagram portrays the normal life cycle for customer orders, which involves only activities relevant to customer order entry and allocation of stock to sales orders in an environment with no exceptions.





Scenario flow description

The scenario begins with the customer calling the customer service center to place an order. The customer service representative (CSR) provides general information, then receives and keys in the order. The order is then saved and an availability check is used to allocate any available unrestricted stock. If there is not enough stock to satisfy the order, then the order can be saved as an unfinished order and the customer service representative can begin to investigate other potential sources to service the order. The other sources include stock in quality inspection (provisional release), quality stock held by another sales order and changing the production plan to manufacture more product.

The Traffic department creates delivery documents and makes other preparations for new completed sales orders. This provides the warehouse operators with information on where to retrieve stock in the warehouse (picking). Once the transportation carrier has been loaded, the shipment is sent to the customer.

Business activity CM.01.03: Process customer quotation

Activity overview

Description

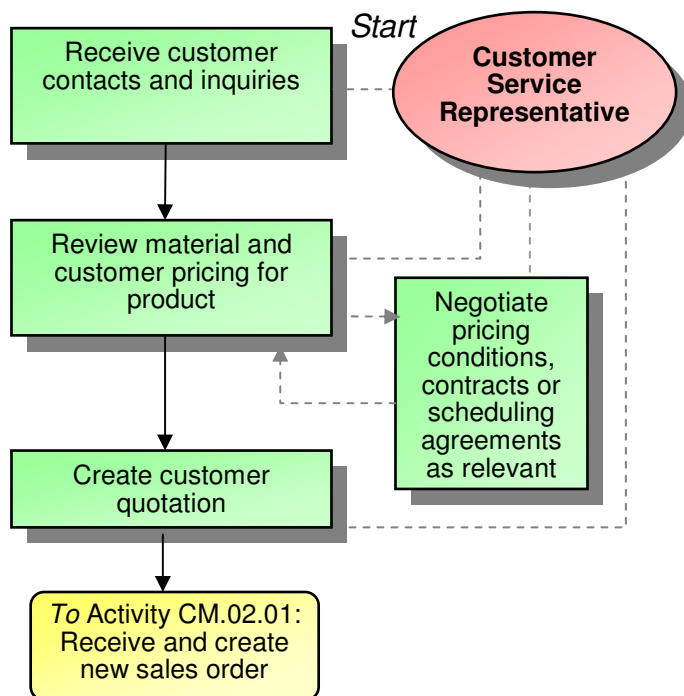
This activity describes the process of receiving and entering a customer quotation in SAP. The customer service representative receives customer contacts and inquiries, verifies product pricing, then quotes the product and enters the quotation in SAP.

Triggers and events

When:	The customer service representative must perform this activity when customers inquire on product pricing.
Who:	Customer service representatives are responsible for this activity.
Frequency:	Every time a new customer inquiry is received.
Objective or resulting event:	Customer quotation initially created in SAP.

Business activity flow CM.01.03

This diagram shows the detailed flow for this activity. The business activity begins with the customer service representative receiving customer inquiries and ends with the initial creation of a customer quotation, after which it proceeds to the next activity (CM.02.01 Receive and create new sales order) in the business scenario.



Work task list

The following list describes the tasks that need to be performed by the customer service representative for the activity **CM.01.03 Process customer quotation**. This activity refers to a general case.

CM.01.03-A Customer Service Representative		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
When potential customers call or otherwise correspond with the company	Receive call or other communication from customer.	Telephone, e-mail, voice mail, letters and SAP
When necessary to negotiate prior to sales orders	Review product pricing defined in master records in SAP. Negotiate pricing conditions, contracts or scheduling agreements as relevant.	Communicate with New Product Coordinator if necessary.
As required per customer contact or pre-sales order	Create and save a customer quotation in SAP using transaction code VA21.	SAP

Business activity CM.02.01: Receive and create new customer order

Activity overview

Description

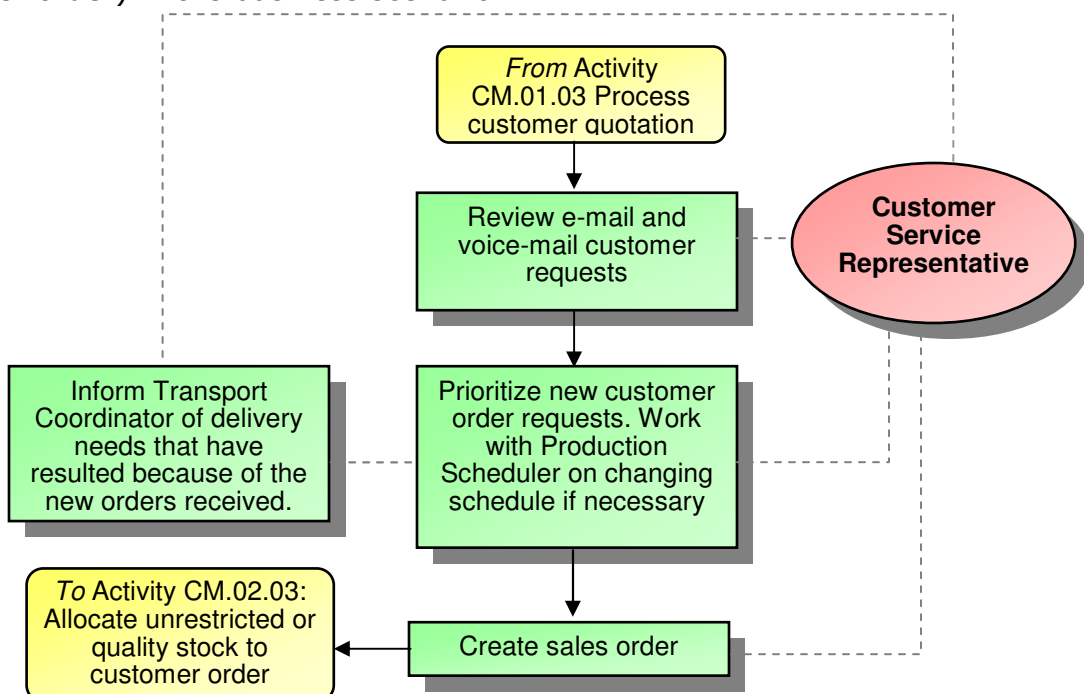
This activity describes the process of receiving and entering a standard sales order in SAP. The customer service representative records the customer's request, prices the order, and checks both customer credit and material availability.

Triggers and events

When:	The customer service representative must perform this activity when receiving and creating new sales orders.
Who:	Customer service representatives are responsible for this activity.
Frequency:	Every time a new customer order is received.
Objective or resulting event:	Sales order initially created in SAP.

Business activity flow CM.02.01

The following diagram shows the detailed flow for this activity. The business activity begins with the customer service representative reviewing e-mail and voice mail for customer requests and ends with the initial creation of a sales order, after which it proceeds to the next activity (CM.02.03 Allocate unrestricted or quality stock to customer order) in the business scenario.



Work task list

The following list describes the tasks that need to be performed by the customer service representative for the activity **CM.02.01 Receive and create new sales order**. This activity refers to a general case. Changes and variations are likely given the volume of customer orders and nature of work in the customer service department.

CM.02.01-A Customer Service Representative		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Start at beginning of shift and ongoing throughout the day.	Review e-mail list – view customer orders that are critical to the plan or urgent. Make a priority list of the orders to process customer order changes.	E-mail and voice mail
Start of the day after all priority orders have been reviewed.	For each customer order worked on from the priority list: contact the Traffic department and inform of changes that are needed to delivery loads for today's delivery or for next week's.	Inform Transport Coordinator of changes to delivery by telephone or e-mail.
Ongoing throughout the day	Create a sales order in SAP and run the ATP (available-to-promise) calculation. Transaction VA01 is used to create a sales order for new orders and VA02 is used to access orders already created.	SAP
3:00 p.m.	Check with traffic that crucial deliveries have been managed and processed and update traffic with any changes that might occur in the following week.	Contact the Transport Coordinator .



Business activity CM.02.03: Allocate unrestricted or quality stock to customer order

Activity overview

Description

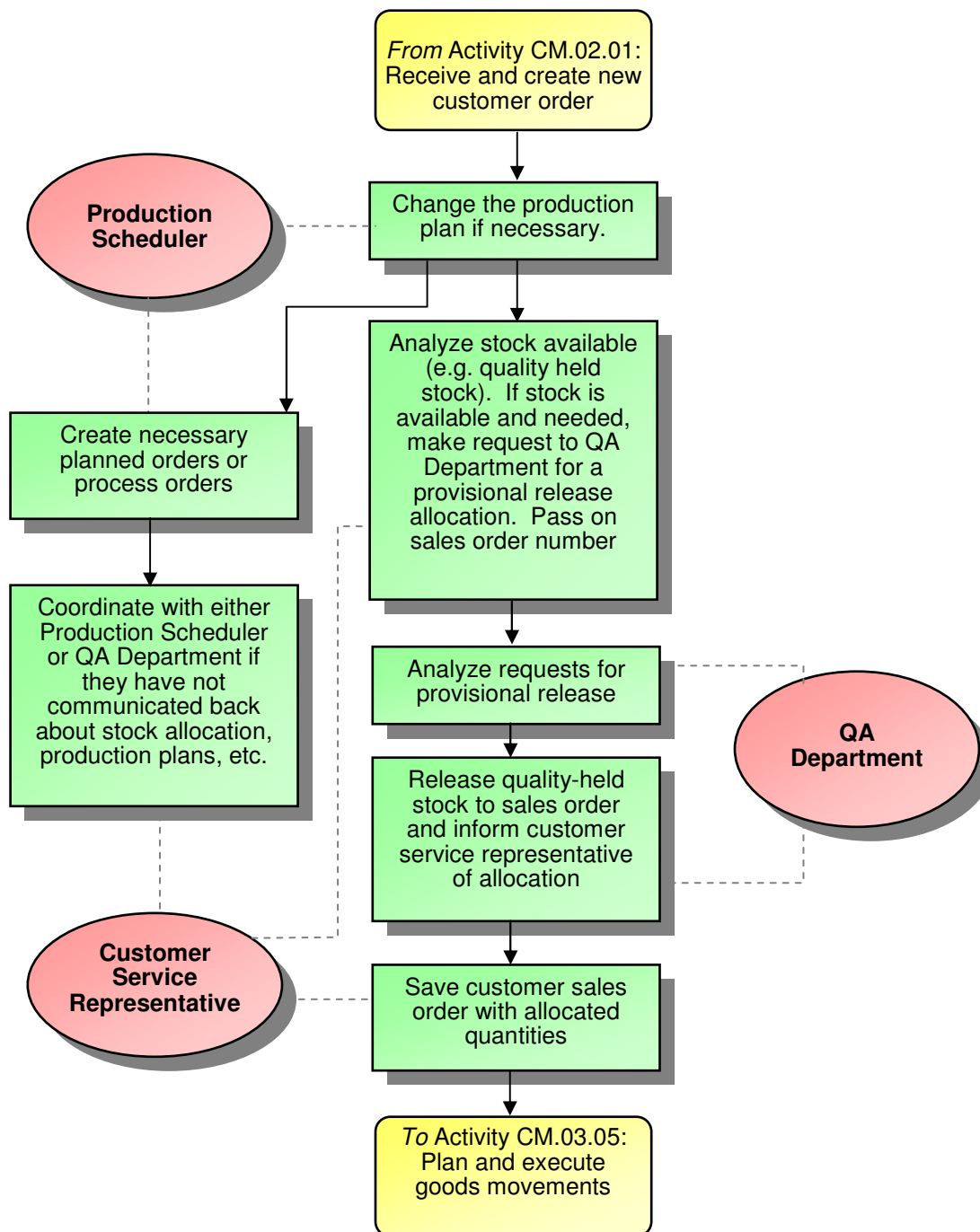
In this activity, the **customer service representative** determines how to allocate restricted stock to a sales order. This activity would be used if, at the time of the sales order creation, there was no stock to allocate to the order. This procedure begins by accessing the sales order in the SAP system to change it with the new allocation. In this activity the customer service representative investigates with the **production scheduler, QA department** and **other customer service representatives** to see from which orders they can de-allocate stock to service the newly created customer order.

Triggers and events

When:	The customer service representative must perform this activity after creating new sales orders.
Who:	Customer service representatives are responsible for coordinating this activity with the quality management team and the production team members.
Frequency:	This depends on: the rate of calls received, the workload and the due dates and times that other departments are expected to fulfill requirements. For example, Production Planning states that a production order will be ready by a certain time and it would be appropriate to check whether stock can be allocated at that time. The customer service representative coordinates with the Quality Management team and the relevant production planners to have stock allocated and de-allocated.
Objective or resulting event:	The goal here is to limit the number of unconfirmed sales orders that do not have any missing allocated quantities. The ideal goal would be to have none. At the end of this activity the ideal result should be that the order has allocated quantities and that the order has a confirmed status.

Business activity flow CM.02.03

The following diagram shows the detailed flow for this activity. The business activity begins with the production scheduler working with the customer service representative to modify stock requirements and ends with the saving of a sales order with allocated quantities, after which it proceeds to the next activity (CM.03.05 Plan and execute goods movement) in the business scenario.



Work task list CM.02.03-A

The following list describes the tasks that need to be performed by the production scheduler for the activity **CM.02.03: Allocate unrestricted or quality stock to customer order**.

CM.02.03-A Production Scheduler		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Pursuant to agreement with customer service representative in task CM.02.01	Change the production plan. Various transactions may be executed in SAP, such as MPS (MD40). Refer to business process PP for further information.	Pass on new plan to Customer Service Representative .
As a result of the previous task	Create necessary planned orders (transaction MD11) or process orders (transaction COR1) in SAP.	SAP

Work task list CM.02.03-B

The following list describes the tasks that need to be performed by the customer service representative for the activity **CM.02.03: Allocate unrestricted or quality stock to customer order**.

CM.02.03-B Customer Service Representative		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Ongoing throughout the day	Review restricted quality stock and analyze to determine whether stock is a candidate for provisional release. Use transactions MMBE (Stock overview) and CO09 (Availability overview).	Contact QA Department and request the provisional release when the order is being processed.
Ongoing throughout the day	Review (from previous task) orders that have been scheduled to have a provisional released stock quantity allocated to the order. Contact the QA department if this has not been done within 30 minutes or if a receipt has not been received declining the request.	Get a receipt from the QA Department that the request for allocating the quality stock has been received and that the stock has been allocated in SAP.



CM.02.03-B Customer Service Representative		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Ongoing throughout the day	Get from the production scheduler within 30 minutes the likelihood of including the change to the production plan. If not, work with the production scheduler on getting stock needed in the future on the production plan. Within 30 minutes, get a receipt or confirmation of whether the plan has changed.	Work with Production Scheduler via telephone or e-mail.
Ongoing throughout the day	Contact the customer if it is not possible to service the order fully and negotiate a smaller amount to be delivered.	Contact customer.
Ongoing throughout the day	Once the sales order has a confirmed status then save the order. Use transaction VA01 if the order is a new order or VA02 if the order has already been saved (i.e. we are changing the allocations).	SAP

Work task list CM.02.03-C

The following list describes the tasks that need to be performed by the quality assurance department for the activity **CM.02.03: Allocate unrestricted or quality stock to customer order**.

CM.02.03-C QA Department – Business Focus Quality Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
During the day	Receive a request to allocate quality restricted stock to a sales order	Receive request from Customer Service Representative . Must supply the customer order number.
Once the Customer Service Representative receives quality stock request	Research requested stock lot and verify that it is feasible to release this for the sales order. Use transaction QA11 (Record usage decision).	SAP



CM.02.03-C QA Department – Business Focus Quality Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Within one hour of the request	Allocate the quality inspection stock to the newly created customer order. Record transaction in SAP. Use transaction QA11.	Inform the Customer Service Representative that the quality stock has been allocated to the order.
4.00 p.m.	End of day or shift – check that all requests for quality stock allocation have been done by the end of the day. Process each request in the way described about until it has completed.	SAP

Business activity CM.03.05: Plan and execute goods movements

Activity overview

Description

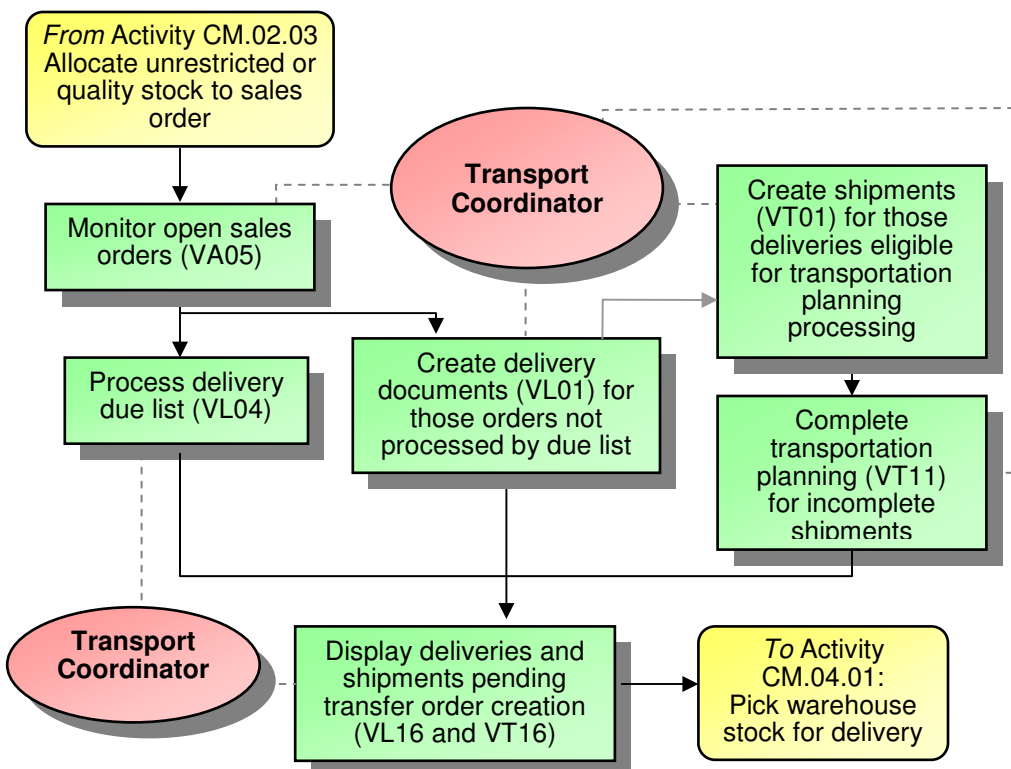
In this activity, the **transport coordinator** creates a delivery and/or shipment for a sales order, leading eventually to a transfer order from which stock can be picked for goods issue.

Triggers and events

When:	Perform this activity after customer service representatives have saved sales orders with allocated stock.
Who:	The transport coordinator is primarily responsible; warehouse and traffic clerical support have secondary responsibility.
Frequency:	Outgoing deliveries depend on sales volume but are generally processed on a daily basis.
Objective or resulting event:	The goal here for this activity is to process deliveries and shipments successfully so that a picking list may be created.

Business activity flow CM.03.05

This business activity begins with the transport coordinator monitoring open sales orders and ends with the completion of delivery and shipment documents pending transfer order creation, after which it proceeds to the next activity (CM.04.01 Pick warehouse stock for delivery) in the business scenario.



Work task list

The following list describes the general tasks that need to be performed by the transport coordinator for the activity **CM.03.05 Plan and execute goods movements**.

CM.03.05-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
7:00am - 9:00am (until 10:30am for non-supervisor staff)	Discuss any problems from the previous production meeting that might affect today's shipments. Create a list of affected shipments.	Other warehouse staff
9:30am - 10:30am	Warehouse supervisors attend the production meeting.	Warehouse Supervisor



CM.03.05-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
10:30am onwards	List issues that have been identified from the production meeting. Supervisor passes on issues to Transport Coordinator.	Warehouse Supervisor
Performed continuously throughout the day.	Process deliveries using due list (VL04), individual creation for orders that can be processed with the due list (VL01)	Performed in SAP in conjunction with Warehouse & Traffic Clerical Support
Performed continuously throughout the day.	Create shipments (VT01) for those deliveries eligible for transportation planning processing and complete transportation planning (VT11) for incomplete shipments.	Performed in SAP in conjunction with Warehouse & Traffic Clerical Support
Performed continuously throughout the day.	Scan all deliveries and shipments that have been created. Transactions VL16 and VT16 are used to do this.	SAP

Business activity CM.04.01 Pick warehouse stock for delivery

Activity overview

Description

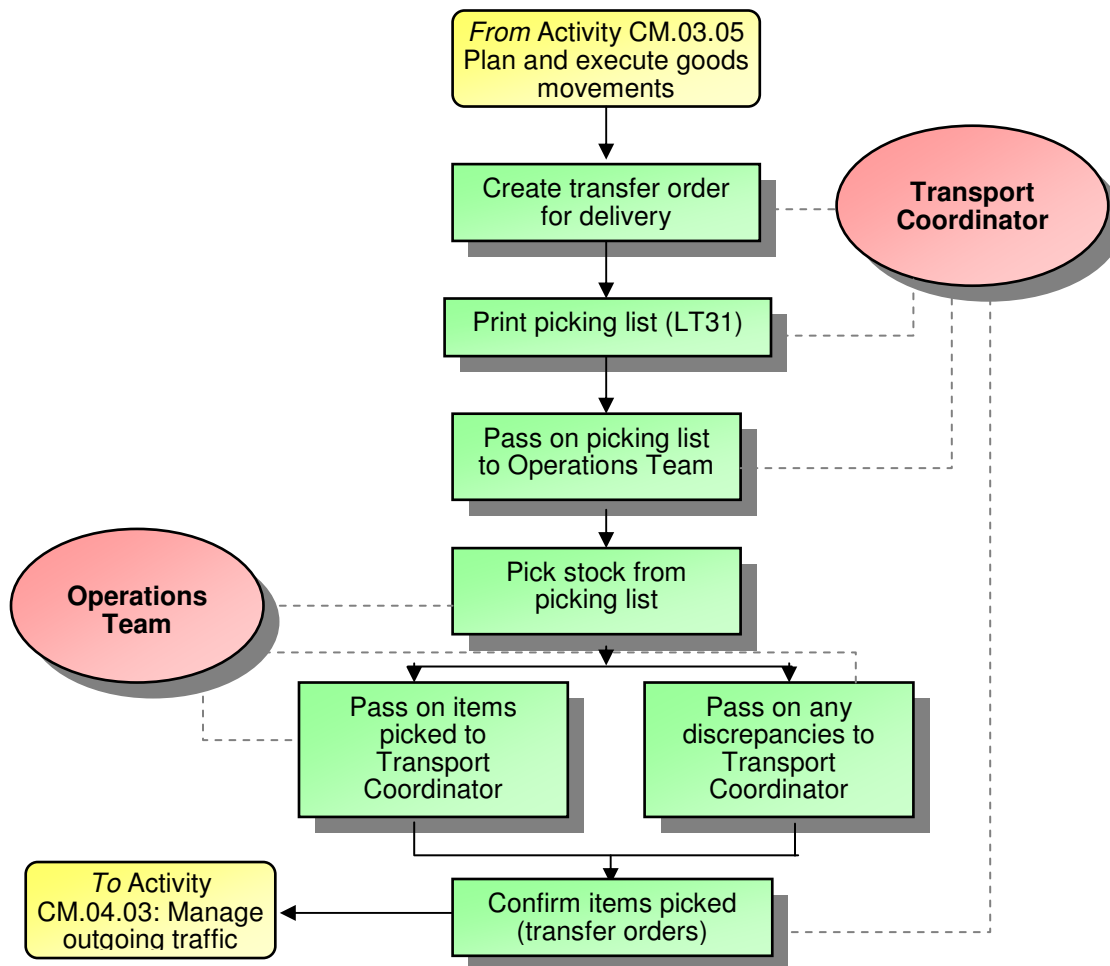
In this activity, the **transport coordinator** creates transfer orders and passes the resulting picking list to the operations team, then confirms the items picked.

Triggers and events

When:	Perform this activity after processing deliveries for picking in activity CM.03.05.
Who:	The transport coordinator is responsible for coordinating this activity with the operations team.
Frequency:	Depends on frequency of activity CM.03.05.
Objective or resulting event:	The goal here for this activity is to create a picking list from transfer orders and successfully confirm the items picked.

Business activity flow CM.04.01

This business activity begins with the transport coordinator creating transfer orders and ends with the confirmation of the picking list, after which it proceeds to the next activity (CM.04.03 Manage outgoing traffic) in the business scenario.



Work task list

The following list describes the general tasks that need to be performed by the transport coordinator for the activity **CM.04.01 Pick warehouse stock for delivery**.



CM.04.01-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Performed continuously throughout the day.	Using the list of shipments that need to be processed with transaction VT16 to create transfer orders (picking list) for shipments. Main transaction code is LT43.	SAP
Performed continuously throughout the day.	Where shelf life is a factor, transfer orders (pick tickets) should be created 24 hours before the shipment begins.	Customer Service Representative calls or e-mails about special requirements. (May be checked by the Traffic Department who then inform the warehouse of this special requirement).
Performed continuously throughout the day.	For transfer orders that are not successful – for example because of lack of stock available in normal bin locations – the transport coordinator creates manual transfer orders by moving (“juggling”) stock around until the delivery can be satisfied. Transaction LT03 is used to create a manual transfer order to move stock around to satisfy a delivery. (For example you might send missing stock to location 999 - cycle counting). Transaction LT12 is also used to manage transfer orders.	SAP and manual stock transfers
Performed continuously throughout the day.	Print picking and packing list for operations team. Transaction LT31 is used to print picking for a shipment and VL71 for packing.	SAP
Performed continuously throughout the day.	Pass on picking list to operations team to pick stock for delivery.	Hand off to Operations Team
Performed continuously throughout the day.	Note – there may be iterations of picking and changes to the picking list if stock cannot be found in a number of locations. Picking tickets are reprinted after each change.	(Repeats some of the picking tasks listed previously)



CM.04.01-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Performed continuously throughout the day.	Once the warehouse operations team have confirmed that all the stock items have been picked the deliveries are confirmed using transaction LT25 (confirms all deliveries) or you can use transaction code LT12 to confirm delivery by delivery.	SAP

Business activity CM.04.03 Manage outgoing traffic

Activity overview

Description

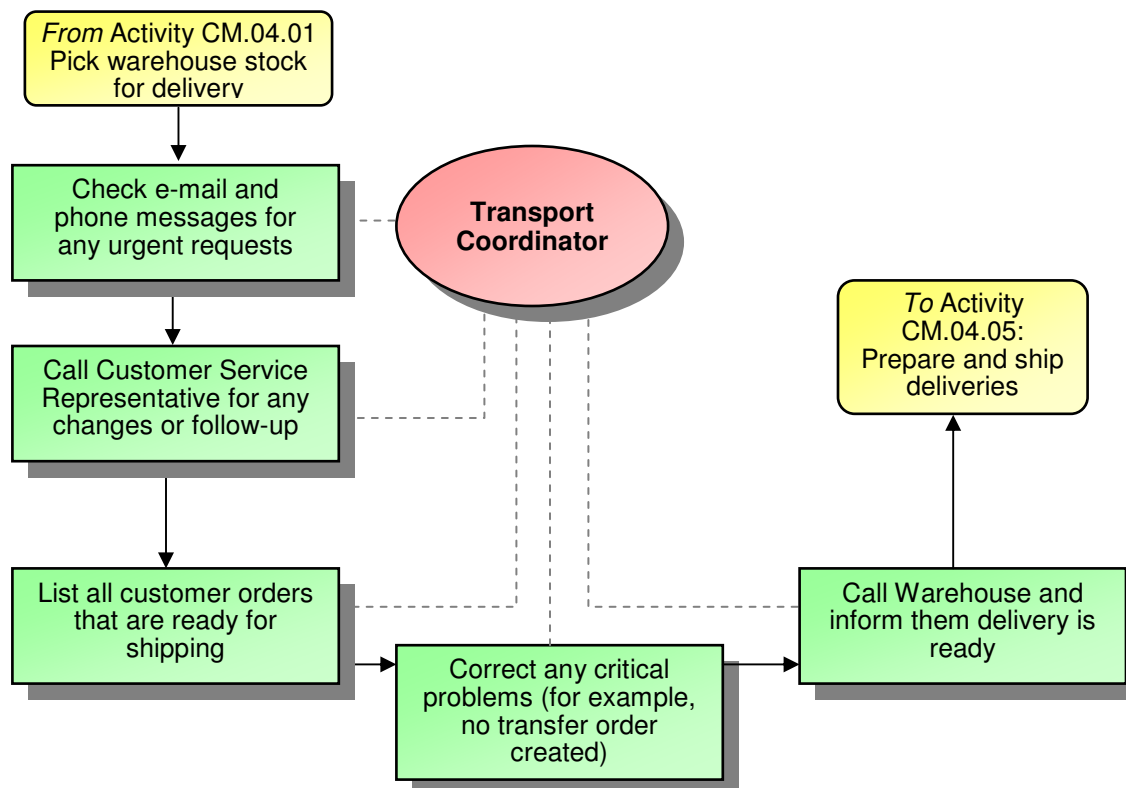
In this activity, the **transport coordinator** works with the warehouse and customer service to verify all sales orders are ready for shipping.

Triggers and events

When:	Perform this activity after picking stock for delivery in activity CM.04.01.
Who:	The transport coordinator is responsible for coordinating this activity with the customer service and warehouse staff.
Frequency:	Depends on the frequency of activity CM.04.01.
Objective or resulting event:	The goal here for this activity is to verify all sales orders are ready for shipping.

Business activity flow CM.04.03

This business activity begins with the transport coordinator checking for urgent requests and ends with informing the warehouse the delivery is ready, after which it proceeds to the next activity (CM.04.05 Prepare and ship deliveries) in the business scenario.



Work task list

The following list describes the general tasks that need to be performed by the transport coordinator for the activity **CM.04.03 Manage outgoing traffic**.

CM.04.03-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Performed continuously throughout the day.	E-mail or telephone the Traffic department when there are a number of shipments to be processed. For example every time a shipment is created or every two hours. This informs or prompts the traffic department to process shipments (Traffic also monitors this in conjunction).	Inform Traffic department of confirmed shipments.



CM.04.03-A Transport Coordinator		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Performed continuously throughout the day.	Once Traffic have printed the associated papers for the shipment (notified by e-mail or telephone), execute a goods issue transaction for the delivery (VL19).	SAP
11:00pm	Check that all stock that was supposed to have been shipped has gone. This is a final check. Notify Customer Service Representatives and Traffic team members of any problems that have occurred during the end of the day.	Communicate with Customer Service Representative and Warehouse & Traffic Clerical Support of any problems that may have occurred during the end of the day so that they are prepared for working on these issue beginning of the next day.

Business activity CM.04.05 Prepare and ship deliveries

Activity overview

Description

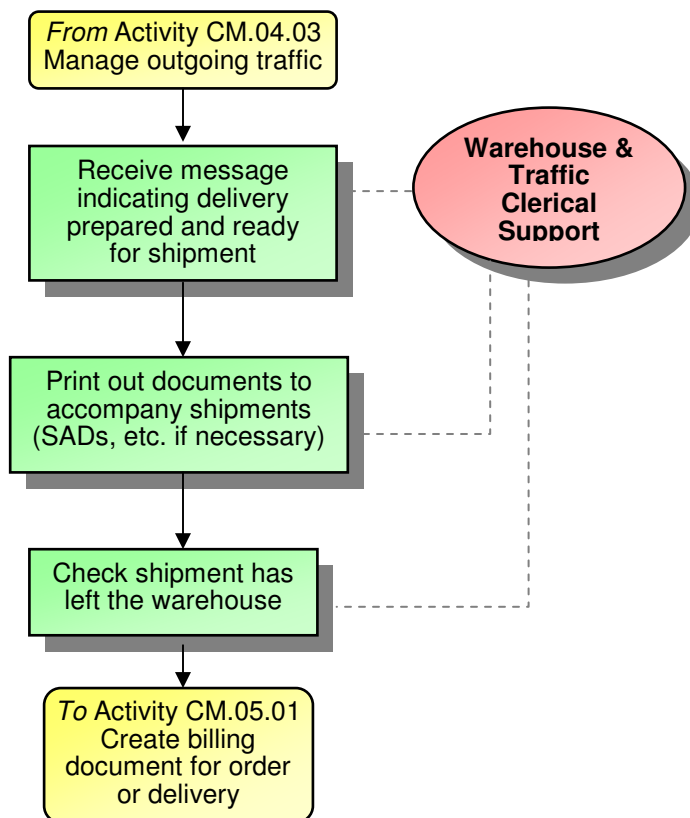
In this activity, **warehouse and traffic clerical support** personnel work with customer service and other warehouse and traffic staff during final preparation of outgoing shipments.

Triggers and events

When:	Perform this activity after the transport coordinator has managed outgoing traffic in activity CM.04.03.
Who:	Warehouse and traffic clerical support personnel are responsible for coordinating this activity with the customer service and warehouse staff.
Frequency:	Depends on the frequency of activity CM.04.03.
Objective or resulting event:	The goal here for this activity is to perform all final functions necessary to ensure shipments have left the warehouse.

Business activity flow CM.04.05

This business activity begins with the warehouse and traffic clerical support staff listing outgoing shipments and ends with the verification of final goods issue. The next activity in a typical business scenario might be CM.05.01 Create billing document for order or delivery (not covered in this example scenario).



Work task list

The following list describes the general tasks that need to be performed by warehouse and traffic clerical support staff for the activity **CM.04.05 Prepare and ship deliveries**.

CM.04.05-A Warehouse and Traffic Clerical Support		
<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
7:00am	Check e-mails and phone messages for any urgent requests	E-mail and voice mail
7:00am	List out all the shipments that need to go out that day. Use transaction VL10. Call Customer Service Representatives if there are any discrepancies or queries that need to be made.	SAP; inform Customer Service Representative if necessary.
7:00am and throughout the day.	Use transaction V.14 to list blocked customer sales orders.	SAP
Performed continuously throughout the day.	Unblock sales orders that have been blocked by the Customer Service Department. Use transaction VA03 to unblock sales orders.	SAP



CM.04.05-A Warehouse and Traffic Clerical Support

<i>Time and frequency</i>	<i>Task needed/event associated</i>	<i>Hand-offs/receipt from other users or systems</i>
Performed continuously throughout the day.	Delivery documents are then created for all unblocked sales orders. Transaction VL10 is used to create delivery documents.	SAP
Performed continuously throughout the day.	Deliveries that are not assigned to a shipment are then assigned to a shipment using transaction VT01. (A shipment is created using this transaction).	SAP
Performed continuously throughout the day.	Contact warehouse by e-mail or telephone that a delivery has been created either periodically or for each delivery created.	Hand off delivery to Transport Coordinator.
Performed continuously throughout the day.	Wait for confirmation from the Transport Coordinator that the delivery has been confirmed.	Transport Coordinator calls or e-mails that the shipment is complete.
Performed continuously throughout the day.	Print out the necessary documents that need to go with the shipment. Transaction VL71 is used to print out documents that need to go out with the order.	SAP
Performed continuously throughout the day.	For shipments that need to have SADs (Single Administrative Document: usually customs form C88) printed for frontier declarations, use transaction VF01 to print documentation.	SAP
End of the day	Organize work and prepare for the start of the next day.	Job Profile is Warehouse & Traffic Clerical Support.

Appendix A: SAP Transactions

These activities access the following transactions. Please refer to business process procedure (BPP) documentation in the ASAP repository for more detailed transactional information.

BPP	Description	SAP Roles
VA02	Change/Delete Standard Order: Used to access a sales order saved that has not been able to satisfy the ATP calculation.	Plan Transportation Activities; Process Credit/Debit Memo Request; Process Return Orders; Process Third Party Orders; Process Customer Sales Orders
MMBE	Stock Overview: This report gives the Customer Service Representative the ability to view for a material number what quantity of stock is kept at unrestricted and what quantity has been marked as quality inspection stock.	Check Stock Availability; Display Stock List
CO09	Availability Overview: This report provides the Customer Service Representative the sales order number that has a particular batch of quality stock allocated to it.	Check Stock Availability; Display Production Order
COR1	Create Process Order: Used in exceptional cases where stock is needed immediately.	Create Process Order Manually
MD11	Create a Planned Order: Used to help satisfy the ATP check for a sales order. Infrequently used as the MPS program creates planned orders for sales order requirements.	Maintain Planned Orders Manually
MD41	MPS Single Item Multi-level. Used to create planned orders from requirements.	Maintain Master Production; Scheduling-Single-Item
QA11	Record Usage Decision: The QA Department uses this transaction to allocate quality inspection stock to a sales order.	Complete Inspection Lot; Process Calibration Inspection
MB1B	Enter Transfer Posting: The QA Department uses this transaction to de-allocate quality inspection stock from a sales order.	Create Two Step Stock Transfer; Process Subcontracting Stocks; Process Third Party Stocks

Appendix B: Exceptions

The following are exception conditions to the main process and list the actions that can be taken when the exceptions occur.

Exception	Responsible Person	Action
Not enough unrestricted stock to satisfy customer order quantity	Customer Service Representative	Work with a production planner to see what other types of stock can be used and see what stock will be produced in the future. They create a planned order or process order (in exceptional cases) to satisfy customer orders if the production schedule permits this, then analyze quality inspection stock to see whether a provisional release can be used.
All quality inspection stock allocated to other customer orders	Customer Service Representative	Work with other customer service representatives to see whether some of the quantities allocated to other orders can be released.
Not enough quality inspection stock to allocate to customer order	Customer Service Representative	Work with production planners to see whether it is possible to create more planned orders or whether there will be stock available soon. If planner cannot provide contact customer and negotiate to see whether a smaller quantity (available and possible to deliver) is acceptable.
Immediate requirement to manufacture finished product	Production Scheduler	Create a process order to manufacture product. This is used in exceptional cases.
Immediate requirement to create planned order	Production Scheduler	Create a planned order to satisfy ATP check in sales orders.