Sales Order Entry – Header Screen

The Order Header Screen allows entry of such information as the customer p.o. #, job name, and special instructions for the order. The search buttons (magnifying glasses) indicate that there is a lookup available for the shipping state, ship via, salesperson, terms, and job name. The first button in the lower left corner of the screen (Display Logs) will allow the operator to display the history log and the transmission log for the order. The other button (Payment History) will display payments against the invoices that have been generated from this order, whether it is a charge sale or a cash sale. The <Contact Info> button will display a list of employees for this customer with their email addresses and phone numbers. To proceed to the line items on the order, click on the <ITEMS> button with your mouse.

Sales Order Entry – Line Items

Line	Status	Mfgr / Catalog #	Quantity	u/m	Sell Price	Discount	Net Price	Extension
	Cust Part #	Description					Cost	gp%
003	B	ARL 2020	12	C	41.69	.0000	41.69	5.00
		1-IN COND HANGER W/BOLT					32.07	23.08
004		PVC 1-1/2-90D-SCH-40-COND-ELL	10	C	94.14	.0000	94.14	9.41
		1-1/2-90D-SCH-40-COND-ELL					79.78	15.25
005		PVC 1-1/2-PVC-SCHED-40 CONDUIT	100	C	35.45	.0000	35.45	35.45
		1-1/2-PVC-SCHED-40 CONDUIT					28.35	20.03
006		PVC 1-IN-PVC-SCHED-40 CONDUIT	5	C	21.73	.0000	21.73	1.09
		1-IN-PVC-SCHED-40 CONDUIT					17.381	20.01
007		KLE 70581	1	E	3.90	.0000	3.90	3.90
		8PC FOLDING HEX KEY SET					3.38	13.33
008		KLE J203-7	1	E	19.90	.0000	19.90	19.90
		7IN NEEDLE NOSE PLIERS					17.23	13.42

Order #: 0005544 NEW

Customer: ABCELEC ABC ELECTRIC INC

06/26/2023 GREAT LAKES ELECTRIC ORCTR3 SOM

Sales Order Entry - Display Order Lines

009 Part: [ ] Mfgr ID/Catalog: [ ]

Descr: [ ] UoM: [ ]

Qty Ordered: 0 Sell Price: [ ] Extension: 0.00

Discount: 0 Unit price: 0.00

Available: [ ] Cost: 0.00 Gross Profit %: 0.00

Buttons: ORDER OPTIONS, QUOTES, FREIGHT, ITEM STATUS CODES, PUT-UP STATUS, ADD ITEM, UPDATE ITEM, MARGIN CALC

The line-item screen allows the quick adding of new items at the bottom of the screen. After an item has been added, it can be changed by clicking on the line item itself and the next screen will be displayed that allows changes or the entry of comments. Eight line items are displayed on the screen, but if there are more items on the order, a scroll bar will appear and the operator can scroll up and down through the items. When the operator has finished entering the items, they hit the OPTIONS button and are given the options to complete the order.

Sales Order Entry – adding Multiple Line Items

Click on the Grid on the right of the magnifying class for the Part #, and the system will allow entry of the line items from a spreadsheet. The spreadsheet can be built by entering a list of manufacturers, company house #'s, customer part #'s, previous sales for this customer (stock only), and items most frequently bought by the customer.   The operator can select from only the active items for the branch or all items in the system that meeting the selections above.

Sales Order Entry - add Line Items from spreadsheet					
Order #: 0005544 NEW Customer: ABCELEC ABC ELECTRIC INC					ORCTS1
Vendor: WIR					Modify Sequence
		Qty Available	Order Qty	u/m	UPC #
WIR 18/2 OAS PVC CABLE	COMMUNICATION CABLE	2500	0	M	98019901190
WIR BARE-SD-14-SOL-CU-1CL WIRE	BARE-SD-14-SOL-CU-1CL WIRE	0	0	M	98010069402
WIR BARE-SD-3/0-19STR-CU-500R WIRE	BARE-SD-3/0-19STR-CU-500R WIRE	0	0	M	98010033782
WIR BARE-SD-3/0-7STR-CU-1000R WIRE	BARE-SD-3/0-7STR-CU-1000R WIRE	0	0	M	98010033583
WIR BARE-SD-4-SOL-CU-200R WIRE	BARE-SD-4-SOL-CU-200R WIRE	1085	0	M	98010033454
WIR BARE-SD-4/0-19STR-CU-1000R	BARE-SD-4/0-19STR-CU-1000R	0	0	M	98010033793
WIR BARE-SD-6-SOL-CU-315R WIRE	BARE-SD-6-SOL-CU-315R WIRE	821	0	M	98010033440
WIR BARE-SD-8-SOL-CU-500S/R WIRE	BARE-SD-8-SOL-CU-500S/R WIRE	234	0	M	98010033430
WIR CAT5E 350 PLENUN BLUE	COMMUNICATION WIRE	0	0	M	98019901170
WIR CAT5E350 PVC WHITE	COMMUNICATION CABLE	8400	0	M	98019901150
WIR FPLP 16-2 NON SHIELDED PLENUM	FIRE ALARM	0	0	M	98019901260
WIR FPLP 16-2 SHIELDED	FIRE ALM CABLE	5000	0	M	98019901360
WIR FPLP-14/2-NON SH	14/2 NONSHIELD PLENUM RED	1000	0	M	98019999996
WIR FPLP-18/2-SH	18/2 SHIELDED PVC RED	0	0	M	98019999999
WIR FPLP-18/2-SH-PLENUM	18/2 SH PLENUM RED	0	0	M	98019999995
WIR FPLR-14/2-NON SH	14/2 NONSHIELD RED	7000	0	M	98019999997

UPDATE   EXIT

Items can be added to the order by entering a quantity in the "Order Qty" column. If the items need to be in a certain order on the customer order, then use the "Modify Sequence" button to moved up or down on the list of items.

Sales Order Entry – sort line items from spreadsheet

Sales Order Entry - sort line items				
Order #: 0005544		Customer: ABCELEC ABC ELECTRIC INC		ORCTS1_SEQ
Seq	Mfgr	Catalog #	Description	Quantity
001	WIR	NM-B-8/2-CU-WG-500S/R WIRE	NM-B-8/2-CU-WG-500S/R WIRE	250
002	WIR	NM-B-14/2-CU-WG-1000S/R WIRE	NM-B-14/2-CU-WG-1000S/R WIRE	1000
003	WIR	CAT5E350 PVC WHITE	COMMUNICATION CABLE	500
004	WIR	THHN-10-BLK-19STR-CU-2500S/R	THHN-10-BLK-19STR-CU-2500S/R	2500
005	WIR	THHN-10-BLU-19STR-CU-2500S/R	THHN-10-BLU-19STR-CU-2500S/R	2500
006	WIR	THHN-10-GRN-19STR-CU-2500S/R	THHN-10-GRN-19STR-CU-2500S/R	2500
007	WIR	NM-B-12/2-CU-WG-250CL WIRE	NM-B-12/2-CU-WG-250CL WIRE	250

⬆ Move up

⬇ Move down

✎ UPDATE ⮐ Go Back

Highlight the line in the list box and then hit <Move Up> or <Move Down> in order to adjust the sequence that the items will be added to the customer order.

Sales Order Entry – Single Order Line Item

This screen allows the operator to make changes for line items on orders, to view more information concerning the item, or to cancel the item. Each of the options, in the pull-down on the right, display a screen with information or allows further action, such as entering house tag information (used by lighting showrooms) or requesting that the item be put on a purchase order. If this option is selected, the purchase order will be created when the operator updates the customer order. When the operator clicks on UPDATE ITEM, the changes are updated and they are returned to the Line Items screen above. If they click on the option to display the Inventory Status, the Stock Item Inquiry screen below is displayed.

Stock Item Inquiry

Stock Item Inquiry				
		GREAT LAKES ELECTRIC		PRCHK2INQ

Product: 01899702020 ARL 2020
1-IN COND HANGER W/BOLT

Order #	Qty	Customer	Req Date	Note
0005544-003(00)	12	ABCELEC ABC ELECTRIC INC	--ASAP--	

Qty On Hand:	58
Committed: -	0
Available to Sell:	58
Qty Due to Customers: -	12
Orders in work:	46
Qty Due from PO'S: +	0
P.O.'s in work:	58
Qty Due to Transfer:	0
Qty Due from Transfer:	0
Direct Ship to Cust:	0
Qty Overstocked:	45
Replacement cost:	32.07
Order Base:	84.68 u/m: C
Matrix Sell:	251 C+
ARLINGTON	

Location:

◉ Orders   ○ Committed   ○ Locations
○ Purchase Orders

✖ EXIT

This screen shows the inventory status on the right side of the screen and the open customer orders on the left. The operator can switch the information in the box on the left by clicking on the options below the box for orders, purchase orders, committed orders, locations, and transfers (for multi-branch companies).

Sales Order Entry – Margin Calculator

Gross Margin Calculator										
06/26/2023								ORCTS2		
Order #: 0005544		Customer: ABCELEC ABC ELECTRIC INC								
	Mfgr ID & Catalog	Quantity	Base Price	Disc	Net Price	u/m	Unit Cost	extension	grs mg
1	ARL EMT400	25	376.88	.0000	376.88	C	289.91	94.22	23.07
2	ARL 38AST	3	64.96	.0000	64.96	C	49.97	1.95	23.08
3	ARL 2020	12	41.69	.0000	41.69	C	32.07	5.00	23.00
4	PVC 1-1/2-90D-SCH-40-COND-ELL	10	94.14	.0000	94.14	C	79.78	9.41	15.20
5	PVC 1-1/2-PVC-SCHED-40 CONDUIT	100	35.45	.0000	35.45	C	28.35	35.45	20.03
6	PVC 1-IN-PVC-SCHED-40 CONDUIT	5	21.73	.0000	21.73	C	17.381	1.09	20.18
7	KLE 70581	1	3.90	.0000	3.90	E	3.38	3.90	13.33
8	KLE J203-7	1	19.90	.0000	19.90	E	17.23	19.90	13.42
9	WIR NM-B-8/2-CU-WG-500S/R WIRE	250	740.71	.0000	740.71	M	644.10	185.18	13.04
10	WIR NM-B-14/2-CU-WG-1000S/R WIRE	1000	198.41	.0000	198.41	M	154.51	198.41	22.13
11	WIR CAT5E350 PVC WHITE	500	60.95	.0000	60.95	M	53.00	30.48	13.06
12	WIR THHN-10-BLK-19STR-CU-2500S/R	2500	179.78	.0000	179.78	M	96.95	449.45	46.07
13	WIR THHN-10-BLU-19STR-CU-2500S/R	2500	179.78	.0000	179.78	M	105.21	449.45	41.48

Frt / Misc:	Parts Total:	Parts at Cost:	Margin:	Sales Tax:	Total w/tax:
0.00	2008.52	1343.22	33.12	0.00	2008.52

○ Parts Total
◉ Parts total (including tax)

Total Price:	Flat Gross Profit:	Proportionate Gross Profit:
0.00	0.00	0.00

UPDATE ✖ EXIT

The Margin Calculator is available for orders and quotes. It allows the operator to enter a Total Price, or Flat Gross Profit, or Proportionate Gross Profit and then re-calculates the pricing for the items and shows the new parts total, margin and total with tax and freight. The operator can also change the discount, net price, extension, or gross margin for the individual line items.

Sales Order Entry - Order Options

When the operator has finished working on an order, and they click the <ORDER OPTIONS> button, the bottom of the screen changes to allow the order to be updated, invoiced, cancelled, printed, or turned into a quote. These update options are slightly different when the order is a cash sale (cash, check, or charge card) as shown below.