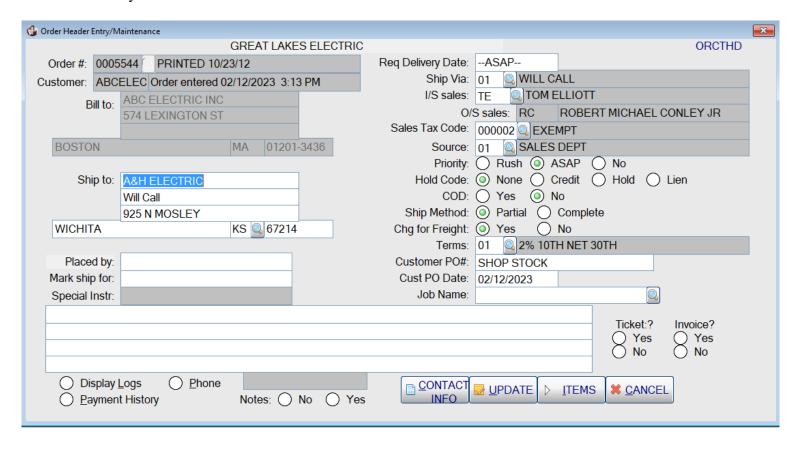
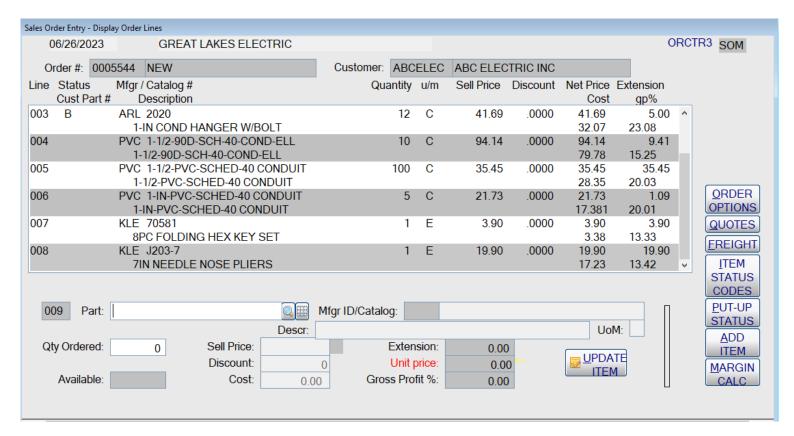
Sales Order Entry

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.

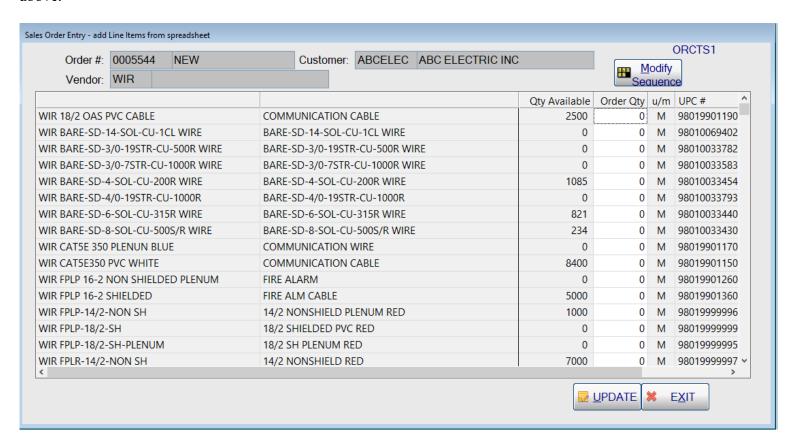
Sales Order Entry – Line Items



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.

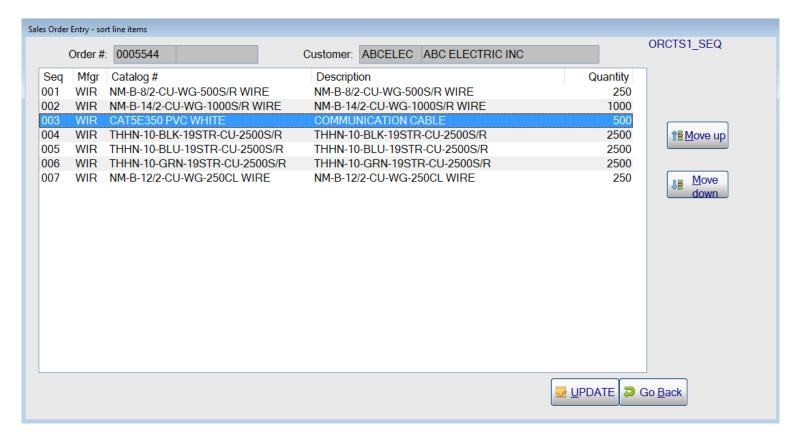
Sales Order Entry – adding Multiple Line Items

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.



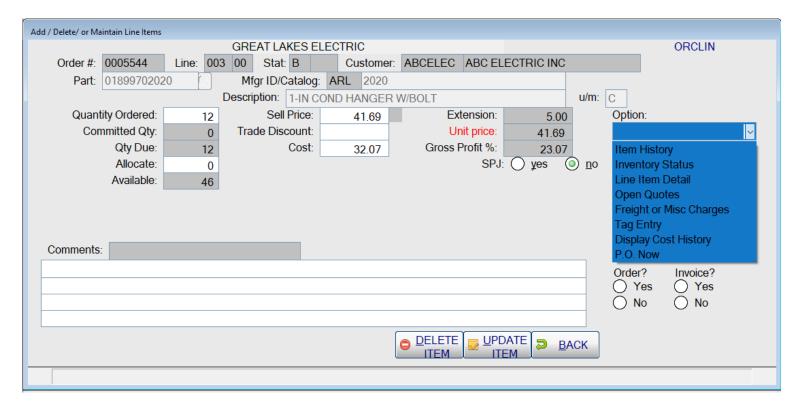
Items can be added to the order by entering a quantity in the "Order Qty" column. If the items need to be in a certain order on the customer order, then use the "Modify Sequence" button to moved up or down on the list of items.

Sales Order Entry – sort line items from spreadsheet



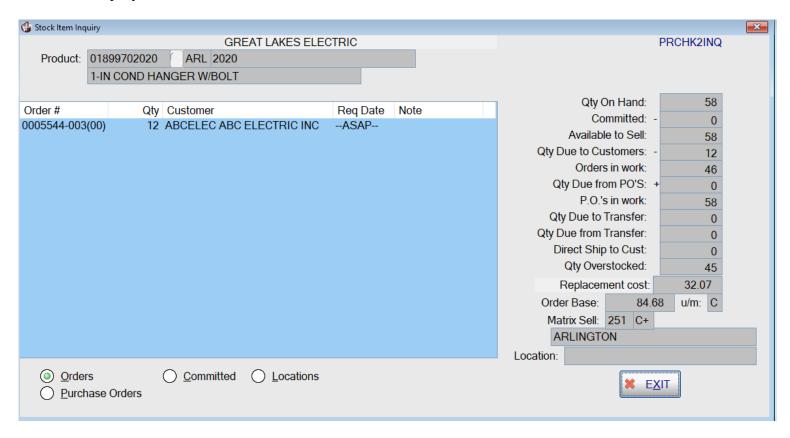
Highlight the line in the list box and then hit <Move Up> or <Move Down> in order to adjust the sequence that the items will be added to the customer order.

Sales Order Entry – Single Order Line Item



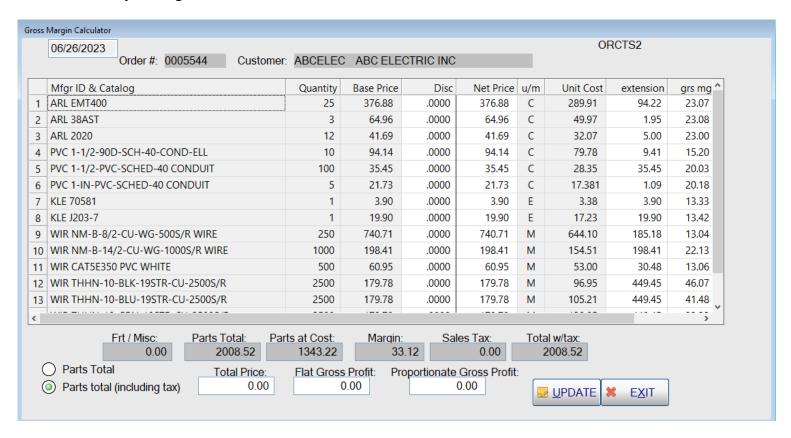
This screen allows the operator to make changes for line items on orders, to view more information concerning the item, or to cancel the item. Each of the options, in the pull-down on the right, display a screen with information or allows further action, such as entering house tag information (used by 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



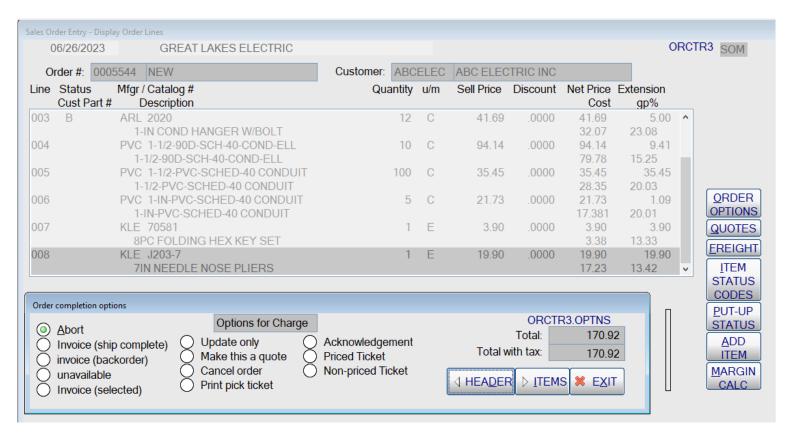
This screen shows the inventory status on the right side of the screen and the open customer orders on the left. The operator can switch the information in the box on the left by clicking on the options below the box for orders, purchase orders, committed orders, locations, and transfers (for multi-branch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

Sales Order Entry - Margin Calculator



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.

