

Sales Order Entry

Sales Order Entry – Header Screen

Order Header Entry/Maintenance WALTHAM SUPPLY ORHDSP ORCTHD

Order #: 0005544 PRINTED 10/23/12

Customer: ABCELEC Order entered 02/12/2022 3:13 PM

Bill to: ABC ELECTRIC INC
574 LEXINGTON ST
BOSTON MA 01201-3436

Ship to: Waltham Supply
Will Call
925 N MOSLEY
WICHITA KS 67214

Placed by: _____
Mark ship for: _____
Special Instr: _____

Req Delivery Date: --ASAP--

Ship Via: 01 WILL CALL

I/S sales: TE TOM ELLIOTT

O/S sales: RC ROBERT CONLEY

Sales Tax Code: 000002 EXEMPT

Source: 01 SALES DEPT

Priority: Rush ASAP No

Hold Code: None Credit Hold Lien

COD: Yes No

Ship Method: Partial Complete

Chg for Freight: Yes No

Terms: 01 2% 10TH NET 30TH

Customer PO#: SHOP STOCK

Cust PO Date: 02/12/2022

Job Name: _____

Ticket? Yes No
Invoice? Yes No

Display Logs Phone _____
 Payment History

Notes: No Yes

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. To proceed to the line items on the order, click on the ITEMS button with your mouse or hold down the <Alt> key and hit an <I>.

Sales Order Entry – Line Items

Sales Order Entry - Display Order Lines

06/10/2022 WALTHAM SUPPLY ORCTR3 SOM

Order #: 0005544 NEW Customer: ABCELEC ABC ELECTRIC INC

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

009 Part: Mfgr ID/Catalog:

Qty Ordered: Descr: UoM:

Available:

Sell Price: Extension:

Discount: Unit price:

Cost: Gross Profit %:

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 – Single Order Line Item

Add / Delete/ or Maintain Line Items

WALTHAM SUPPLY ORCLIN

Order #: 0005544 Line: 003 00 Stat: B Customer: ABCELEC ABC ELECTRIC INC

Part: 01899702020 Mfgr ID/Catalog: ARL 2020

Description: 1-IN COND HANGER W/BOLT UOM: C

Quantity Ordered: 12	Sell Price: 41.69	Extension: 5.00
Committed Qty: 0	Trade Discount:	Unit price: 41.69
Qty Due: 12	Cost: 32.07	Gross Profit %: 23.07

Available: 46

SPJ: yes no

Comments:

<input type="text"/>	Order?	Invoice?
<input type="text"/>	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="text"/>	<input type="radio"/> No	<input type="radio"/> No

Item History

Inventory Status

Line Detail

Open Quotes

Freight or Misc Charges

Tag Entry

Cost Help Screen

P.O. Request

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 buttons in the lower left 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 button to display the Inventory Status, the Stock Item Inquiry screen below is displayed.

Stock Item Inquiry

WALTHAM SUPPLY
PRCHK2INQ

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

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

Orders
 Committed
 Locations
 Purchase Orders

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

32.07 u/m: C
 Order Base: 84.68
 Matrix Sell: 251 C+
 ARLINGTON
 Location:

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 - Order Options

Sales Order Entry - Display Order Lines

06/10/2022 WALTHAM SUPPLY ORCTR3 SOM

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			.0000	17.23		13.42

Buttons: ORDER OPTIONS, QUOTES, FREIGHT, ITEM STATUS, UP, US, D, M, BIN, C

Order completion options

Abort **Options for Charge** ORCTR3.OPTNS

Invoice (ship complete) Update only Acknowledgement

invoice (backorder) Make this a quote Priced Ticket

unavailable Cancel order Non-priced Ticket

Invoice (selected) Print pick ticket

Total: 170.92

Total with tax: 170.92

Buttons: < HEADER, > ITEMS, X EXIT

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.

Order completion options

Abort **Options for C.O.D** ORCTR3.OPTNS

Invoice (ship complete) Update only Acknowledgement

Invoice (backorder) Make this a quote

unavailable Cancel order

Invoice (selected)

Total: 162.89

Total with tax: 162.89

Buttons: < HEADER, > ITEMS, X EXIT