

Screen Shots – Sales Order Entry

Sales Order Entry – Header Screen

Order Header Entry/Maintenance WALDEN SERVICES INC. ORHDSP ... X  
WALDEN SERVICES INC. ORCTHD

Order #: 0009727 NEW from Quote: 01502 Requested Delivery Date: -ASAP-  
Customer: BAILY Order entered 08/10/2012 9:31 pm Ship Via: 01 PICK UP  
I/S sales: 0011 NATHAN GONGOLESKI  
O/S sales: 0010 SHOWROOM TE

Bill to: BAILEY AND ZAHNER  
135 SPRING STREET  
WRENTHAM MA 02093  
Sales Tax Code: 000100 MASS 6.25%  
Source: 01 SALES DEPT

Ship to: BAILEY AND ZAHNER  
135 SPRING STREET  
WRENTHAM MA 02093  
Priority:  Rush  ASAP  No Rush  
Hold Code:  None  Credit  Hold  Lien  
COD:  Yes  No  
Ship Method:  Partial  Complete  
Future Project:  
Charge for Freight:  Yes  No  
Terms: 01 2% 10TH NET 30TH

Send Invoice to: C Invoice to: Bill-to Customer PO#: 120-428-6571  
Placed by: BILL VANDERCLOCK Misc Charge: 0.00 Cust PO Date: 02/22/2013  
Mark ship for:  
Reason:  
Special Instr: Job Name: COUNTY BLDG DEPT

Print on Ticket:  Yes  No  
Print on Invoice:  Yes  No

Display Logs  Payment History Notes:  No  Yes

UPDATE ITEMS CANCEL

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

**Customer Order Entry - Display Order Lines**

03/01/2013 WALDEN SERVICES INC. ORCTR3

Order #: 0009727 NEW Customer: BAILY BAILEY AND ZAHNER SOM

Line	Status	Mfgr	Catalog #	Quantity	Unit Price	u/m	Extension
			Description	Trade Discount	Cost	Requested	gp%
001		MAP	0499	3	16.445	E	49.34
			MULTI STN SMK DET RELAY	.0000	12.65	-ASAP-	23.08
002		MAP	CXA2	2	9.62	E	19.24
			DOOR CHIME KIT	.0000	7.40	-ASAP-	23.08
003		AMI	2718	2	2105.60	C	42.11
			50FT LIGHT W/METAL GUARD	.0000	1504.00	-ASAP-	28.57
004		ANG	23136	1	162.42	M	.16
			18/2 TRANS GOLD CORD	.0000	108.28	-ASAP-	33.33
005		ARL	802	10	50.00	C	5.00
			1"EMT SS CONN	.0000	25.00	-ASAP-	50.00
006		BRS	SN350	100	66.3404	M	6.63
			1-1/16X1-7/16 2/3SEC STPL	.0000	49.88	-ASAP-	24.81
007		CAP	R19P	4	11.50	E	46.00
			WHITE TRIM	.0000	6.00	-ASAP-	47.83

008 Part:  Mfgr ID/Catalog:

Descr:  UOM:

Quantity Ordered:  Sell Price:  Extension:

Discount:  Unit price:  <<-

Available:  Cost:  Gross Profit %:

ADD ITEM

OPTIONS

UPDATE ITEM

EXIT


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**

**WALDEN SERVICES INC.** ORCLIN

Order # **0009727** Line: **004** Stat:  Customer: **BAILY** **BAILEY AND ZAHNER**

Part: **78907000903**  Mfgr ID/Catalog: **ANG** **23136**

Description: **18/2 TRANS GOLD CORD** UOM: **M**

Quantity Ordered: <b>1</b>	Sell Price: <b>162.42</b>	Extension: <b>0.16</b>
Committed Qty: <b>0</b>	Trade Discount:	<b>Unit price:</b> <b>162.42</b> <<--
Qty Due: <b>1</b>	Cost: <b>108.28</b>	Gross Profit %: <b>33.33</b>
	Requested: <b>-ASAP-</b>	SPJ: <input type="radio"/> yes <input checked="" type="radio"/> no

Available: **362**


Comments:

Print on Order:  Yes  No

Print on Invoice:  Yes  No

- Item History
- Inventory Status
- Line Detail
- Open Quotes
- Tag Entry
- P.O. Request
- Cost Help Screen

- **DELETE**  
**ITEM**

 **UPDATE**  
**ITEM**

**X** **EXIT**

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

Stock Item Inquiry
WALDEN SERVICES INC.
PRIQOR
X

Product: 78907000903 ANG 23136
PRCHK2INQ

18/2 TRANS GOLD CORD

Order #	Quantity	Customer	Req Date	Note
0009097-003	2	TEST TEST CUSTOM...	-ASAP-	
0009136-002	10	ALPHA ALPHA ELECT...	-ASAP-	P00001109-002
0009136-003	15	ALPHA ALPHA ELECT...	-ASAP-	P00001110-001
0009368-001	100	ABBOT ABBOTT CON...	-ASAP-	
0009556-004	10	APOTH APOTHEOSIS ...	-ASAP-	
0009727-004	1	BAILY BAILEY AND Z...	-ASAP-	

Qty On Hand: 500

Committed: 0

Available to Sell: 500

Qty Due to Customers: 138

Orders in work: 362

Qty Due from PO'S: 50

P.O.'s in work: 550

Qty Due to Transfer: 0

Qty Due from Transfer: 0

Direct Ship to Customers: 0

Qty Overstocked: 362

Repl Cost: 108.28 U/M:

Order Base: 0.00

Matrix Sell: 812 C+ ANGELO BROTHERS

Location:

Orders
 Committed

Purchase Orders
 Transfers

X 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, and transfers.

## Order Options

Customer Order Entry - Display Order Lines

03/01/2013 WALDEN SERVICES INC. ORCTR3

Order #: 0009727 NEW Customer: BAILY BAILEY AND ZAHNER SOM

Line	Status	Mfgr	Catalog #	Quantity	Unit Price	u/m	Extension
			Description	Trade Discount	Cost	Requested	gp%
001		MAP	0499	3	16.445	E	49.34
			MULTI STN SMK DET RELAY	.0000	12.65	-ASAP-	23.08
002		MAP	CXA2	2	9.62	E	19.24
			DOOR CHIME KIT	.0000	7.40	-ASAP-	23.08
003		AMI	2718	2	2105.60	C	42.11
			50FT LIGHT W/METAL GUARD	.0000	1504.00	-ASAP-	28.57
004		ANG	23136	1	162.42	M	.16
			18/2 TRANS GOLD CORD	.0000	108.28	-ASAP-	33.33
005		ARL	802	10	50.00	C	5.00
			1"EMT SS CONN	.0000	25.00	-ASAP-	50.00
006		BRS	SN350	100	66.3404	M	6.63
			1-1/16X1-7/16 2/3SEC STPL	.0000	49.88	-ASAP-	24.81
007		CAP	R19P	4	11.50	E	46.00
			WHITE TRIM	.0000	6.00	-ASAP-	47.83

ORCTR3.OPTNS

Abort     
  Update only     
 Options for Charge

Invoice (ship complete)     
  Make this a quote     
 Priced Ticket     
 Total: 168.48

invoice (backorder)     
 Cancel order     
 Acknowledgement     
 Total with tax: 179.01

unavailable     
 Print pick ticket     
 Margin calculator     
     

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

ORCTR3.OPTNS

Abort     
  Update only     
 Options for C.O.D

Invoice (ship complete)     
 Make this a quote     
 unavailable     
 Total: 168.48

invoice (backorder)     
 Cancel order     
 unavailable     
 Total with tax: 179.01

unavailable     
 unavailable     
 Margin calculator

Screen Shots – Quotations System

Quote Header Screen

**Quote Maintenance** QUMNT2

Quote #:	00555	Salesman Giving Quote:	0010	SHOWROOM TEST FOR LONGE
Customer:	ABBOT	Terms For Order:	01	2% 10TH NET 30TH
Bill to:	ABBOTT CONSTRUCTION	Phone:	[508] 477-4227	
	PO BOX 309	Contact:	WILLIAM ABBOTT	
	3 BILLINGS ROAD	Job Name:	NEW JOB FOR ABBOT	
	MASHPEE MA 02649		BILL VANDERCLOCK	
Ship To Code:	0001	P.O. Number:	1122332211555	
Ship to:	SHIPTO ABBOTT TEST	Beginning Date:	01 Jan 2013	
	ADDR1 TEST	Ending Date:	10 Dec 2013	
	ADR2	Lead Time From Order:	5	
	ANYWHERE MA 01801	# of Times Quote Can Be Used:	50	
		# of Times Quote Has Been Used:	29	
Special Instructions:		Sales Tax Code:	000100	MASS 6.25%

THESE COMMENTS SHOULD TRANSFER TO THE CUSTOMER ORDER

Display Log    UPDATE    CANCEL    ITEMS    EXIT

The Quote Header Screen allows entry of such information as the customer p.o. #, job name, and special instructions for the quote. The search buttons (magnifying glasses) indicate that there is a lookup available for the shipping address, ship-to state, salesperson, terms, and job name. The beginning and ending dates can also be changed by clicking on the search buttons. To proceed to the line items on the quote, click on the ITEMS button with your mouse or hold down the <Alt> key and hit an <I>.

Quote Line Items Screen

**Quote Line Items**
X

Quote # **00555**
Customer: **ABBOT**
**ABBOTT CONSTRUCTION**

Ln	Mfg	Catalog	Qty Ord	Sell \$\$	Extension
001W	ACB	1 LIGHT	10	9.46	94.60
002	BLI	B22-10FT-GRN	100	229.09	229.09
003	WIR	THHN-12-YEL-19STR-CU-500S/R	1000	56.19	56.19
004	AMI	3062	1	719.50	7.20
005X	ALM	3300-N	1	176.42	.00
006	ALM	LH-1P	10	120.45	12.05
007	SYL	F30T12/CW/RS	24	6.64	159.36
008	BRS	SN350	100	74.45	7.45
009	ADV	VEL-4P32-RH-TP	10	26.36	263.60
010	ADV	VEL-4P32-RH-TP	10	26.36	263.60
011	ADV	R-2S40-TP	10	26.36	263.60
012	GAR	10-001	5	130.99	.66
013	HUB	TEST OF ADDING A SPECIAL	1000	4,640.44	4640.44

**Parts Total:**  
5997.84

Ln: **014** Part:  Mfg ID/Catalog:

Description:  UOM: **E**

Quantity Quoted: <input type="text" value="1"/>	Sell Price: <input type="text"/>	Extension: <input type="text" value="0.00"/>
Minimum Qty: <input type="text" value="1"/>	Trade Disc: <input type="text" value=".0000"/>	<b>Unit price:</b> <input type="text" value="0.00"/>
Maximum Qty: <input type="text" value="1"/>	Quoted Cost: <input type="text" value="0.00"/>	Gross Profit %: <input type="text" value="0.00"/>

Available:

+ **ADD ITEM**

**OPTIONS**

X **EXIT**

<F3> for catalog search
03/01/13
pvxuser8
Term #: T2

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. Seventeen line items are displayed on the screen, but if there are more items on the quote, 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 quote.

Quote – Detail Line Item Screen

Add / Delete/ or Maintain Line Items
QUOLIN.MNT

Quote # **00555**    Line: **003**    Customer: **ABBOT**    **ABBOTT CONSTRUCTION**

Part: **45010022935**    Mfgr ID/Catalog: **WIR**    **THHN-12-YEL-19STR-CU-500S/R**

Description: **THHN-12-YEL-19STR-CU-500S/R**    UOM: **M**

Customer Part #:

Quantity Quoted:	<b>1000</b>	Sell Price:	<b>56.19</b>	Extension:	<b>56.19</b>
Minimum Qty:	<b>0</b>	Quoted Trade Disc:	<b>.0000</b>	Unit price:	<b>56.19</b> <<
Maximum Qty:	<b>0</b>	Quoted Cost:	<b>38.70</b>	Gross Profit %:	<b>31.13</b>

Available: **500-**

Comments:

THIS IS THE FIRST LINE OF COMMENTS
SECOND LINE OF COMMENTS
THE THIRD LINE

Display Item History  
 Tag Entry  
 Inventory Status

<b>&lt;F3&gt; for catalog search</b>	<b>03/01/13</b>	pvxuser8	Term #: T2
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This screen allows the operator to make changes for line items on quotes, 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). When the operator clicks on UPDATE, 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 is displayed.



# Quotes – Gross Margin Calculator

**Gross Margin Calculator**
QUMGCA

3/01/2013
Quote #: **00555**
Customer: **ABBOT** **ABBOTT CONSTRUCTION**

	Mfgr ID & Catalog	Quantity	Base Price	Discount	Net Price	um	Unit Cost	extension	grs mg
1	ACB 1 LIGHT	10	9.46	.0000	9.46	E	7.00	94.60	26.00
2	BLI B22-10FT-GRN	100	229.09	.0000	229.09	C	169.10	229.09	26.19
3	WIR THHN-12-YEL-19STR-CU-500S/R	1000	56.19	.0000	56.19	M	38.70	56.19	31.13
4	AMI 3062	1	719.50	.0000	719.50	C	457.00	7.20	36.53
5	ALM 3300-N	1	0.00	.0000	0.00	C	147.02	0.00	0.00
6	ALM LH-1P	10	120.45	.0000	120.45	C	95.22	12.05	21.00
7	SYL F30T12/CW/RS	24	6.64	.0000	6.64	E	4.76	159.36	28.31
8	BRS SN350	100	74.45	.0000	74.45	M	49.88	7.45	33.02
9	ADV VEL-4P32-RH-TP	10	26.36	.0000	26.36	E	25.44	263.60	3.49
10	ADV VEL-4P32-RH-TP	10	26.36	.0000	26.36	E	25.44	263.60	3.49
11	ADV R-2S40-TP	10	26.36	.0000	26.36	E	9.28	263.60	64.80
12	GAR 10-001	5	130.99	.0000	130.99	M	28.12	0.66	78.79
13	HUB TEST OF ADDING A SPECIAL	1000	4640.44	.0000	4640.44	M	0.00	4640.44	100.00

Parts Total:	Parts at Cost:	Margin:	Sales Tax:	Total w/tax:
<b>5997.84</b>	<b>1012.86</b>	<b>83.11</b>	<b>374.87</b>	<b>6372.71</b>
Total Price:	Flat Gross Profit:	Proportionate Gross Profit:		
<b>0.00</b>	<b>0.00</b>	<b>0.00</b>		

The Gross 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. The operator can also change the discount, net price, extension, or gross margin for the individual line items.

Screen Shots – Purchase Order Processing

Purchasing Header Screen

**Purchase Order Maintenance - Header Screen**

P.O. # **0006244**      **WALDEN SERVICES INC.**      Direct Ship Ticket #       **POMT01**

Placed by **NRS**      Status **NEW**      Cust PO

Vendor # **SYL**      **1-800-343-0666**      **EDX**

Mail To: **GTE PRODUCTS CORP.**  
**105 ANDOVER STREET**  
**DANVERS, MA 01923**

Ship To: **WALDEN SERVICES INC.**  
**3 ROSEANNA PARK DR**  
**WALTHAM**  
**MA**            **02452**

Acct # **12531**

Entry Date **09 Aug 2012**      Additional Discount **.00**

Expected Delivery Date **16 Aug 2012**      Payment Terms **02**      **2% 10 NET 30**

Shipping Method  Partial       Complete

Ship Via Code **05**      **SALESMAN DEL**

F.O.B.

Prepaid P.O.  Y       N      **PREPAY AND ADD**

# Ordered **119**      Total Cost **951.68**

# Received       Total Base **1,935.12**

# Ackwld       Total Wgt

# Billed       Date Printed **00/00/0000**

Last Acknowledged Date **00/00/0000**

Special Instructions

Print on P.O.  
 Yes       No

Notes:  No       Invoices  
 Yes       Log

The Purchase Order Header Screen allows entry of such information as the ship-via, ship-to address, and special instructions for the purchase order. The search buttons (magnifying glass) indicate that there is a lookup available for the ship-via, ship-to state, and the terms. The beginning and ending dates can also be changed by clicking on the search buttons. The Invoices button will display each invoice that has been posted against this purchase order. The Log button will allow the operator to display the transmission log for the purchase order. 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>.

Purchase Order Line Items

**P.O. Line Item Entry/Maintenance** WALDEN SERVICES INC. POMT03

P.O. # 0006244 Cost Minimum 450.00 Additional Discount           

Vendor: SYL ED Price Break 0.00 Total \$ 951.68

GTE PRODUCTS CORP. Total Weight           

Line	Status	Mfgr	Catalog #	Quantity	u/m	Net Cost	Extension
Part #	Description					Requested	
001		SYL	150R/FL-120V	24	E	3.89	93.36
78613514773	R40 MED LAMP						
002		SYL	50/150A/W/RP-12	12	E	1.99	23.88
78613518060	A21 MED3WAY LAMP						
003		SYL	F30T12/CW/RS	10	E	4.76	47.60
78613523476	36-IN RS LAMP						
004		SYL	F60T12/CW	10	E	8.22	82.20
78613526001	50W 425MA LAMP						
005		SYL	F96T12/CW/SS	15	E	4.52	67.80
78613529815	60W 425MA FLR LMP						
006		SYL	LU100	12	E	22.89	274.68
78613567514	ED23-1/2 MOG HPS LAMP						
007		SYL	LU100/MED	12	E	22.20	266.40
78613567506	B17MED HPS LAMP						
008		SYL	F8T5/CW	24	E	3.99	95.76
78613520816	12-IN PREHT FLUOR LAMP						


ADD ITEM
 UPDATE
 HEADER
 EXIT

Nine line items are displayed on the screen, but if there are more items on the purchase order, a scroll bar will appear and the operator can scroll up and down through the items. 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. When the operator has finished entering the items, they hit the OPTIONS button and are given the options to complete the purchase order.

# Purchase Order Detail Line Screen

**Purchase Order Line Item Entry/Maintenance** POMLIN

P.O. # **0006244** Line: **1** Stat: Vendor: **SYL** **GTE PRODUCTS CORP.**

Part: **78613514773**  Mfg ID/Catalog: **SYL 150R/FL-120V**

Resale Quantity: **1** Description: **R40 MED LAMP** UoM: **E**

Purchase Quantity: **24**

Quantity Ordered: **24** Cost: **3.89** Extension: **93.36**


Quantity Received: **0** customer order:


Quantity Due: **0** Cust Requested Date: **00/00/0000**


Comments:

Print on P.O.  
 Yes  No

- Quantity Help Screen
- Cost Help Screen
- Item Sales History
- Line Item Detail

 **UPDATE  
ITEM**

 **DELETE  
ITEM**

 **EXIT**

New line items can be added to purchase orders on this screen or existing items can be changed. This screen also allows the operator to view more information concerning the item, or to cancel the item. Each of the buttons on the lower left display a screen with information, such as the Quantity Help Screen. When the operator clicks on UPDATE, the changes are updated and they are returned to the Line Items screen above. If they click on the button to display the Quantity Help Screen, the next screen is displayed

# Quantity Help Screen

**Purchase Order Quantity Help Screen** WALDEN SERVICES INC. POQHLP

Part #	MFG ID / CATALOG #		
78613514773	SYL 150R/FL-120V	U/M	E
<b>R40 MED LAMP</b>			
<b>— purchasing information —</b>			
Total on Hand:	86	Usage Rate per Month:	72
Open to Sell PO's/Tr:	48	Lead Time:	.00
Location:	A16L3	Order Point:	33
Qty due to customers:	12	Line Point:	48
Qty due from P.O.'s:	24	EOQ:	12
Net transfer qty:	0	Purchase Info Lock:	
Not tied to OR/TR:	0	Inventory Class:	02
Header Status Code:		Vendor Review Cycle:	.50
Detail Status Code:		Date Last Review:	01/09/2013
Replacement Cost:	3.89	Date Next Review:	01/24/2013
Last Cost Paid:	3.89	Standard Pkg Resale:	1
Date Detail Entered:	10/31/2005	Standard Pkg Purchasing:	24
Last Customer Order:	11/03/2005		
Comments:			

**Lead Time History**

**Purchase Orders**

**Stock Item Inquiry**

**Committed Cust Orders**

**Customer Orders**

**Transfers**

**X EXIT**

This screen shows the inventory status on the left side of the screen and the purchasing information on the right. The operator can also view other screens of information by clicking the buttons on the far right

# Purchase Order Output Screen

**Purchase Order Output Selection** POCTR4

Purchase Order:

Vendor:

	Vendor	This P.O.
Base \$\$ Minimum:	0.00	1,935.12
Cost \$\$ Minimum:	450.00	951.68
Weight Minimum:	0	0
Package Minimum:	0	
Price Break1:	0.00	
Price Break 2:	0.00	

\*\*\* Purchase Order Output \*\*\*

- EDI
- Print and EDI
- Fax
- Print and Fax
- Print Only
- E-Mail
- Print and E-Mail
- No Output

When documents are updated, whether it is orders, acknowledgments, quotes, or purchase orders, an output screen is displayed with options on how the document should be delivered. In the case of purchase orders, this screen also recaps the items on the purchase order compared to the minimums for the vendor to pay the freight.