

ENTERING ORDERS USING THE FULL ORDER ENTRY METHOD

SINGLE ORDER

Requesting an Order Number

This discussion will tell you how to enter an order to a single vendor using the "full" order entry. This format can be used for any type of order and has access to all the fields on the order you might need to change. There are some other specialized methods of entering orders that are discussed separately.

The first step in entering the order is to request a "new" order from either the "Update order file" screen or the "Update Master Order" screen. Both take you to the same new order dialog screen. A new order is requested by clicking on the "new" icon (**New**). You get there by going to Order Processing → Add/Update Orders → Update Order File or Update Master Order



Illustration 1: Menu Access for Order Entry

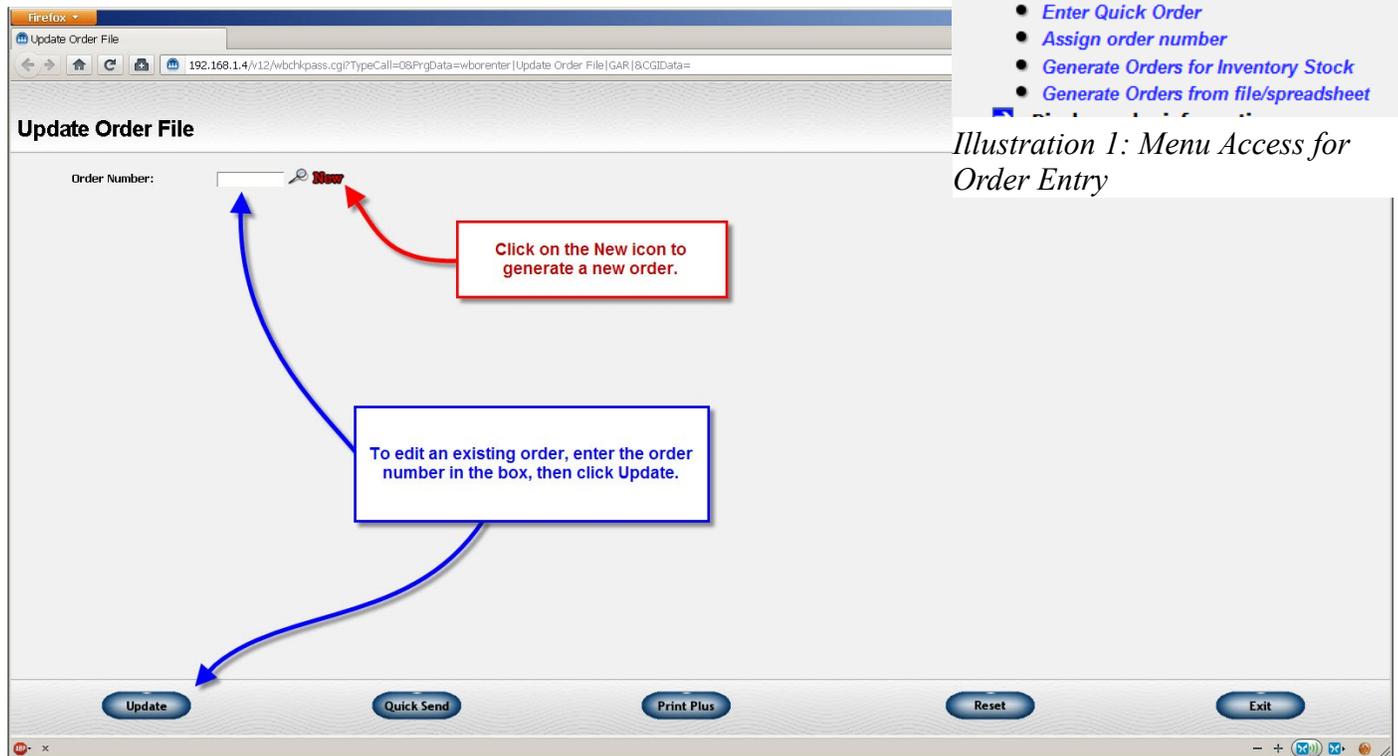


Illustration 2: Update Order File Screen

When you get to the "new order" dialog screen, the default is to generate a new "Single order/Append to master" order. All you need to do is click the Submit button to have a new order generated. The system will

assign the next order number in sequence and display the first screen of the order, the one with general information such as customer, vendor, and shipping address.

EXCEPTION If you want to assign the new order a specific order number, enter the order number you want to use in the "new order number" field before clicking Submit. You may do this on a regular basis or you may assign a specific number on an occasional basis such as when an order was deleted by mistake and you want to put it back on file.

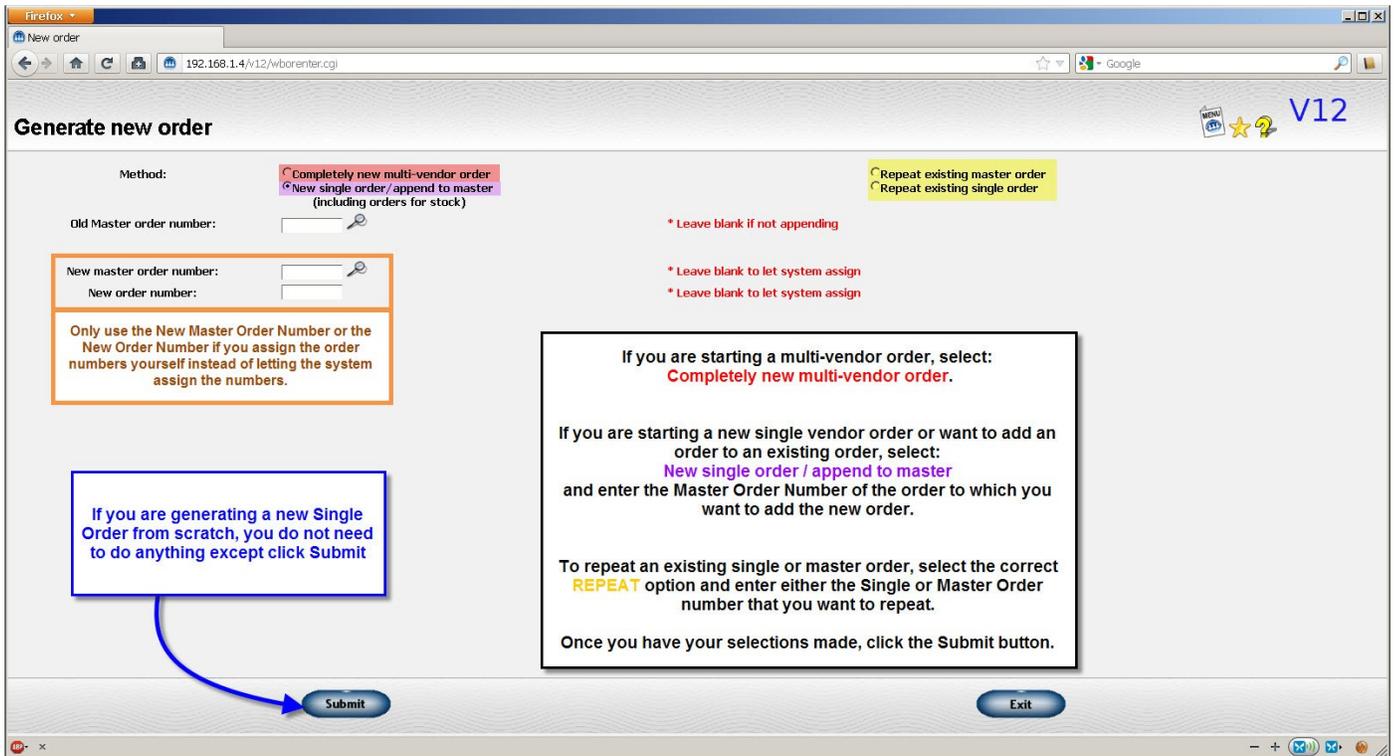


Illustration 3: Generate New Order Screen

Once you click Submit, the new order number will be assigned and the general information screen will be displayed. Read the discussion on the general information screen for more information on this next step in the order entry process.

Entering General Information

When you start a new order, the first screen you will see is the "general information" screen of the order. It is also the first one you see if you use the right arrow from the order overview to update the order. Screenshots are at the end of the document.

This discussion will concentrate on the fields that are commonly used and have a sizable effect on the order. Read the help files below for additional information on these fields as well as other fields on the order that are not discussed.

The help files will also explain any icons used on the screen. To quickly see what an icon or a link does, put your mouse over the icon or link and a short message explaining the icon will appear. For example, if you hover over the update icon beside the customer number field, you will see the message "Update customer file" appear for a few seconds.

EXCEPTION: The tool tip for the look up icon beside the customer, vendor and decorator will show the address of the related field once you have selected a code.

For example, the look up icon beside the customer will initially have a tool tip of "Click to look up customer". Once you choose the customer, it will display the mailing address of that customer.

Order Number: 711485  

V12  

Update order file

Master Order Number: 711485   Typist: GAR

Type Order: Drop Ship Ship from Inventory Order for Stock Order for Consigned Goods
 Manufacture & Sell Manufacture for Inventory Decorate for Stock Decorate & Ship

Customer: 293102     French Nights [Update other Customer-Related data](#)
Vendor: 304700     Gary's Test Vendor [Update other Vendor-Related data](#)
[Update Decorator/Initial 'Ship to' data](#)

Shipping Address:

Attention: Gary French   [Ship to Company Address](#)
Company Name: French Nights [Ship to Multiple Addresses](#)
Street Line 1: 562 S. Flannery Rd
Street Line 2:
City: Baton Rouge [Ship to Store Address](#)
State / Province: LA  Postal Code: 70815 [Update credit card information](#)
Country: [Update Art Numbers](#)

Other Information:

Customer's Order Number: fn052412e   Dstr PO#: fn052412e   Tax routine: * 0001  
Job ID:
Salesman: * 003   /   Program Number:
Order Status:   Open [Update other Dates & Information](#)
Process Group: 06   NO PROCESSES Store:  

Sales Report Categories:

1: 002   2: 020   3: 003   4: 022  

Dates / Shipping information:

Event Date: 6/25/12   Pick up Time:
"In Hand" Date: 6/21/12   Ship Via: 01   UPS GROUND Prepaid/Collect: Prepaid/Inside 
Ship Date: 6/19/12   Proof Due on: 5/31/12   Repeat Date:     1 yr
Follow up Date: 5/29/12    
Special Handling: No 






Illustration 4: General Information Screen

The first choice you must make on this screen is to indicate the **type of order**. The type of order will default to a drop ship order which is the first one listed. If you need to enter another type of order, click on the radio button beside the correct type of order. Fields that are not needed for the new type of order will disappear. If there are additional fields needed for the new type of order, they will appear on your screen.

Read the discussion on the various **types of orders** for additional information on which type of order to pick.

The next important fields you will need to enter are for the **customer, vendor, and/or decorator**.

If you know the customer number, you may enter it. If you don't know the code, you may enter some or all of the name or some other type of alias such as phone number. If the system finds an exact match, then the information will be filled in as if you had entered the code. If the system does **NOT** find an exact match **OR** the customer has more than one contact set up, a list of possible choices will appear and you may pick the appropriate customer/contact from this list. At any point in this process, you can click on the look up icon () beside the customer to pop up the list.

Once you pick a customer, any related data such as billing address, salesman or tax routine will be pulled into the order as well.

If you realize that this is a new customer or that the customer has moved or something else about them has changed, you may click on the update icon () to go add or change the customer's data. When you submit your customer changes, the new data from the customer file will be pulled into the customer-related fields on the order.

You may also set up an additional contact for the customer by clicking on the "rolodex" icon ().

The vendor and decorator look up process works in a similar way except that there are no additional contacts for these types of codes.

On the "decorate for stock" type of order, if the blank goods will be coming from inventory, type in a vendor number of 999999 or click on the "box" icon (). Do the same for the decorator if you will be doing the decoration.

The vendor and decorator fields also have a "world" icon () that lets you access their web site.

The next major field is the **shipping address**. If this is a customer-oriented order, then the shipping address on the customer file will be what is initially used. If this is an order to resupply your inventory, then the shipping address will default to your company, division, or inventory location address depending on which one is appropriate. You may make any changes you wish to the address shown.

If you usually ship to some other address, there is a system option that will let you initially leave the shipping address blank.

If you want the order to be shipped to more than one address, you can set up multiple shipping addresses. This information will be attached to your purchase order. Since this function requires that you indicate how many of each item on the order will go to each address, it is best if you do not set up these addresses until the item detail has been entered. You may come back to this screen and click on the "Ship to multiple addresses" link or you can go to the multiple address set up screen directly from the menu (Order Processing, Miscellaneous order functions, Enter Multiple Shipment data). Read the discussion on setting up ***multiple shipping addresses*** for more information.

If you use the scheduling feature and have multiple scheduling or **process groups** set up, you should enter a process group code on the order if this is one of the types of orders that you want to schedule. For example, you may want to schedule drop ship orders and you should enter a code. You may not schedule shipments from inventory. If not, you may omit the process code.

Only orders that have a process code will be set up for scheduling in the Work in Process system.

If you forget to enter the code, you can come back and do it later to generate the scheduling steps. If you enter the wrong code, you can change it to change the scheduled steps.

The other fields on the order are explained in detail in the help function. Refer to that discussion for additional information.

This screen contains most of the general information about the order that you have to change on a regular basis. There are also several [links](#) on the screen that give you access to additional fields that you change less frequently or perform some other special function. The links are shown in red italics and underlined.

Clicking on one of the following links brings up the screen with the additional fields:

Update other Customer-Related data

Update the billing address and contact information such as FAX or e-mails.

Update order file Customer data
Order Number: 711485 V12

Billing address

A/R Customer: Same as primary customer * Blank if same as customer

Attention: Gary French

Company Name: French Nights

Street Line 1: 562 S. Flannery Rd

Street Line 2:

City: Baton Rouge

State / Province: LA Postal Code: 70815

Country:

Other customer-related information

Contact: Mr. Gary French

Telephone: (337)529-7080

Credit terms: * 01

Transmitting customer acknowledgment

FAX acknowledgment? () - Ext. LD 0

E-mail acknowledgment? g french68@gmail.com

Transmitting shipment confirmations

FAX confirmation? () - Ext. LD 0

E-mail confirmation? g french68@gmail.com

Transmitting customer invoices

FAX invoice? () - Ext. LD 1

E-mail invoice? g french68@gmail.com

* Required Field

Save Reset Exit

Illustration 5: Update Other Customer Related Data Screen

Update other Vendor-Related data

Update the vendor's address and contact information.

Update order file Vendor data Order Number: 711485 V12

Vendor address:

Attention: Donald Duck
Company Name: Gary's Test Vendor
Street Line 1: 1837 Quack Lane
Street Line 2:
City: Baton Rouge
State / Province: LA Postal Code: 70816
Country:
Can e-mail art

FAX order to vendor?
 E-mail order to vendor? (111) 222 - 3334 Ext. LD 3 info@lakeshoregroup.com
Purchase order has NOT been FAXed
Purchase order has NOT been e-mailed

Save Reset Exit

Illustration 6: Update Other Vendor Data Screen

Update Decorator/Initial 'Ship to' data

If you want the vendor to ship the merchandise to an address other than the shipping address, you may enter that information on this screen. For example, you may want to ship blank goods to a decorator or you may want the order shipped to you first.

Update order file Decorator/Initial 'ship to' address Order Number: 711485 V12

Vendor should ship to:

Decorator/Other vendor:
Attention: Gary French
Company Name: French Nights
Street Line 1: 562 S. Flannery Rd
Street Line 2:
City: Baton Rouge
State / Province: LA Postal Code: 70815
Country:
Ship to company address Use final ship to address
Ship to store address

FAX order to decorator?
 E-mail order to decorator? () - Ext. LD ID gfrench68@gmail.com
* Required Field

Save Reset Exit

Illustration 7: Update Decorator/Initial Ship To Screen

Update credit card information

Enter credit card information if the customer will pay by credit card.

Update Credit Card Information V12

Order Number: 711485

Credit Card Information:

Credit Card Number: Security Code:

Expiration Date: Month Year (last 2 digits only)

Name on Credit Card:

Authorization: Date Code Reference

Illustration 8: Update Credit Card Information

Update other Dates & Information

Update the order date, the date the order can be repeated and other miscellaneous data.

Update other dates & information V12

Order Number: 711512

Dates:

Order date: 5/29/12 Acknowledged by vendor:

Original ship date: First shipment:

Other Information:

Previous order number:

Progress of order:

Vendor job number:

Vendor invoice number: Date: (Last one processed)

Illustration 9: Update Other Dates & Information Screen

Update Art Numbers

Associate specific art numbers with this order.

Update order file

Art Numbers

Order Number: 711485

MENU ☆ ? V12

Art Numbers:

1: 🔍 New 📁 📁 📁

4: 🔍 New 📁 📁 📁

7: 🔍 New 📁 📁 📁

10: 🔍 New 📁 📁 📁

2: 🔍 New 📁 📁 📁

5: 🔍 New 📁 📁 📁

8: 🔍 New 📁 📁 📁

3: 🔍 New 📁 📁 📁

6: 🔍 New 📁 📁 📁

9: 🔍 New 📁 📁 📁

Save Reset Exit

Illustration 10: Update Art Numbers Screen

There is a second kind of link that performs a specific function:

Ship to Company Address

Set the shipping address to the address for your company.

Ship to Division Address

If you use divisions, you can have the division address set to the address associated with the division code assigned to the order. If there is no division code assigned, nothing will happen.

If you do not use divisions, you will not see this link.

Ship to Inventory Location

If you use inventory locations, you can have the address associated with the division code assigned to the shipping address. If there is no location code assigned, nothing will happen.

If you do not use separate inventory locations or if this is not an inventory-related order, you will not see this link.

When you finish entering the information on this screen, click on the "Next" button () to go to the next screen where you will enter or update line item data. You can also click on the "Done" button () to go to the order overview.

Entering Line Items

Once you enter the general information and click on the right arrow, you will see the screen where you can enter the information about the item being ordered. You can also get to this screen by clicking on the "New" icon () on the order overview screen.

This discussion will concentrate on the fields that are commonly used. Read the help files below for additional information on these fields as well as other fields on this screen that are not discussed.

The first field on the screen is the **item number**. If you are entering an item that is set up on your item file, enter the item number you have used on that file. If you are entering an order for an item that is **NOT** on your item file, you may use the vendor's item number. You may also leave the item number blank.

Note that if are placing an order for stock, you should still use **YOUR** item number, not the vendor's item number. If the vendor has a different number, you can set that up on the item/vendor set up screen along with his pricing. When you print the purchase order, the **VENDOR'S** item number will used instead of your item number.

If the item number you enter is also set up on the item file **AND** you have **colors and/or sizes** set up, you will be prompted for that information. With regular or reference only items that have colors and/or sizes defined, you **MUST** enter a valid codes for these fields. If you click on the look up field beside the color or size (), you can pick the code from the list of valid codes set up for this item. If the color or size you need is not listed, you will have to set it up. Read more about this process under the discussion on ***setting up valid color/size combinations***.

The exception to the requirement for a valid color/size code is if the item you entered is set up as a "color/size list" item. This type of item lets you enter the quantities for several colors and/or sizes on a separate screen but to still have all of this data associated with this line item. For these items, if you leave the color code blank, **ALL** the colors on the item will be listed on this separate screen. If you leave the size code blank, **ALL** the sizes will be listed on this screen. The advantages and disadvantages of using this type of item are discussed in more detail under the topic of *Using the Color/Size List items on an order*.

The next major field is the **description**. If you have entered an item from your item file, the description on the item file will be used initially. If the item has colors and/or sizes, the color and size information will also be included. You may change it.

Note that on some reports such as the Order History Detail, only the first two lines of the description are normally used in order to make the report shorter. (You have the option to show the entire description.) Other reports show only the first line. It is therefore suggested that you make the first line or two contain the primary description, then include other details on subsequent lines.

Enter the **quantity ordered**.

When you enter or change the quantity ordered for a line item that is on the item file and does not have any other special pricing such as "end quantity", any quantity break pricing will be retrieved. When you leave the screen and save your changes, **ALL** the items on the order will be checked to see if the pricing needs to be updated because of combining quantities on the various line items.

If you are entering a "ship from inventory" order and the item is an inventory item, the quantities allocated, tagged and backordered are also displayed. If the item is available **OR** you do not use the backordering system, the item will be allocated. Otherwise, it will be backordered. Availability is defined as the quantity on hand less the quantities allocated to other orders and less quantities tagged for other orders. Read more about the allocation process in the discussion on *Update inventory including allocating backorders*.

The **unit and extended cost** fields are always shown. Depending on the type of order, you may also see **list price, selling price** and **decoration cost**.

If there is a special pricing or an override price you will see a notation to the left of the field if you return to this screen later.

Also, note that for selling prices, you can click on the lookup icon () beside the unit selling price to see what special pricing such as coop/price group pricing is available for this particular item.

If you return to this line item later to display or change it, you will see some additional fields that show the progress of the order. These fields include the quantity billed or shipped, quantity left to bill, and quantity vouched as well as vouched and billed costs and selling prices.

The entry of the line item data can become quite complicated. For simplicity's sake, the use of the more complicated types of items and issues related to specific types of orders are discussed separately. See the on-line manual menu for additional topics.

When you finish entering the information on this screen, click on the "Next" button () to go to the next screen where you will enter or update another line item data. You can also click on the "Previous" button () to go back to a previous item or the general information screen or click on the "Done" button () to go to the order overview.

Order Number: 711640  

Update order file Line Item # 1  V12   

Item Number:    

Description: *Flakey Frog Fiery Red
[Individual imprint](#)

Color: FR 

Item Report Category: 

Design Number:  

Quantity Ordered: *

Pricing Unit:  Discount Code:  %

| | Unit Amount | Extended |
|----------------|---|-------------------------------------|
| List Price: | <input type="text" value="5.00"/> | <input type="text" value="125.00"/> |
| Cost: | <input type="text" value="1.75"/> | <input type="text" value="43.75"/> |
| Selling Price: | <input type="text" value="5.00"/>  | <input type="text" value="125.00"/> |

Taxable?

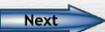
   

Illustration 12: Line Item Screen

Order Number: 711326  

Update order file Line Item # 1  V12   

Item Number:    

Description: *Polo Shirt - Purple
[Individual imprint](#)

Adult - 10 XLarge

Item Report Category: 

Design Number:  

Quantity Ordered: * Billed: Left to bill:
Vouched/Used: Left to Vouch: [Review Release Detail](#)

Pricing Unit:  Discount Code:  %

| | Unit Amount | Extended | Unit Amount | Extended |
|----------------|--|-------------------------------------|-------------|--|
| List Price: | <input type="text"/> | <input type="text"/> | | |
| Cost: | <input type="text" value="8.00"/> | <input type="text" value="80.00"/> | Vouched: | <input type="text" value="8.00"/> <input type="text" value="40.00"/> |
| Selling Price: | <input type="text" value="12.00"/>  | <input type="text" value="120.00"/> | | |

Taxable?

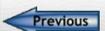
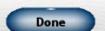
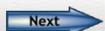
   

Illustration 13: Line Item Screen Showing Vouching

Order Number: 711437  V12

Update order file Line Item # 1 

Item Number: 105101    

Description: * CAJUN SPICE PACK    

[Individual imprint](#)

Item Report Category: 002  

Design Number:   

Quantity Ordered: * 3 Billed: Left to bill: [Review Release Detail](#)

Active Allocated: Tagged: Backordered: [Review Availability](#)

Pricing Unit: 

| | Unit Amount | Extended | Unit Amount | Extended |
|--------------------------|---|------------------------------------|-------------|----------|
| Cost: | <input type="text" value="1.225"/> | <input type="text" value="3.68"/> | | |
| Selling Price: Sp | <input type="text" value="4.95"/>  | <input type="text" value="14.85"/> | | |

Taxable?

← Previous
Exit
Done
Next →

Illustration 14: Line Item Screen from Ship From Inventory showing Allocated/Backordered fields

Reviewing Totals and Commission

Once you have entered all your items and charges, click on the right arrow on a screen where you've not entered any new data to get to the "totals" screen. This screen shows the totals of the order as well as other information that normally appears with the subtotals such as discounts and sales tax. You may also review commission for the order, if this is your policy.

You may also come directly to this screen from the overview.

Miscellaneous order information:

| Type charge | Cost | Price | Other information | |
|-----------------------|-----------------------------------|-------------------------|--|--|
| Merchandise | \$ 24.00 | \$ 40.00 | Profit: \$ 16.00 | 40.00 % |
| Other charges | \$ 15.00 | \$ 15.00 | Profit: \$ | % |
| Sales Discount | Percentage <input type="text"/> % | \$ | | |
| Shipping | \$ <input type="text"/> | \$ <input type="text"/> | Description <input type="text"/> <input type="checkbox"/> Bill shipping on 1st shipment only <input type="checkbox"/> Do not bill shipping | |
| Sales tax on \$ | 55.00 | 3.85 | 7.00 % | STATE, COUNTY, CITY |
| Total order | \$ 39.00 | \$ 58.85 | Profit: \$ 16.00 | 29.09 % (includes shipping) |
| Deposit from Customer | \$ | \$ | Used: \$ | Update credit card information |
| Gift Card Amount | \$ | \$ | | |
| Net due | | \$ 58.85 | | |

Note that only A/P and Customer Invoicing entries that were posted to Order Processing are reflected in any Vouched and Billed numbers displayed above.

Commission

| Commission basis: | | | |
|----------------------|----------|------------------------------------|--|
| Cost | \$ 39.00 | Profit: \$ 16.00 | |
| Sales | \$ 55.00 | 29.09 % | |
| Commission for HOUSE | | | |
| Percentage: | 15.00 % | <input type="checkbox"/> Override? | |
| Commission Amount: | \$ 2.40 | | |
| Advance: | \$ | <input type="checkbox"/> Override? | |
| | % | <input type="checkbox"/> Override? | |
| Commission Amount: | \$ 2.40 | | |
| Advance: | \$ | <input type="checkbox"/> Override? | |

* Required Field

Illustration 15: Totals & Commission Screen of Order

Miscellaneous Order Information

The **sales discount** field lets you apply a percentage discount to the whole order. A couple of points should be noted:

- If the customer has a discount percentage on file, it will automatically be filled in for you and the total discount dollar amount calculated.
- You may change the discount amount shown.
- If you use the separate additional charges feature, you may exclude these from the discount by setting a system option. Otherwise, everything on the order will be included in the discount calculations.

Order Processing System Options

Generate ship date for blanks this many days before "in hand" date for blanks: Leave blank if you do not want system to calculate ship date
Generate follow up date with blank goods vendor this many days after order date: Leave blank if you do not want system to calculate follow up date

For orders where there is a separate decorator
Default ship via code for decoration vendor: 13 FED EXPRESS SAVER
Generate ship date for decorator this many days before "in hand" date for customer: Leave blank if you do not want system to calculate ship date
Generate follow up date with decorator vendor this many days after ship date for blanks: Leave blank

Miscellaneous options

Do you need to have a separate distributor PO # or other ID? (in addition to Dst/PO#)
Description to use for this field:
Initially leave 'Ship To:' address blank?
Prompt for credit card number during order entry?
Do you want a separate 'additional charges' screen?
Are additional charges eligible for sales discount?
Order change log? Log but don't require reason
Maximum time to keep order locked when updating: 60 minutes
Export addresses to UPS/Fedex? Don't use

Quick/Short order options
Default time order for business items on master:

Illustration 16: Order Processing System Options for Additional Charges and Sales Discount

- If you want to give a specific dollar amount that is not based on a percentage or does not include some line items, leave the percentage blank and enter the amount you want to give.

If you have **shipping** costs you incur that you want to make sure are included on the invoice, such as overnighting art to the factory, you may enter a shipping cost. You do **NOT** need to include costs to ship the merchandise to the customer here. You will have a chance to enter that information when you invoice the customer.

If you want to charge the customer a specific shipping amount, you may enter that charge here. An example would be a program where the shipping charges are fixed.

If you only want to charge shipping on the **FIRST** shipment, check the box labeled "Bill shipping on 1st shipment only". An example might be a program where you do not charge shipping charges if you have to ship backorders separately.

If you do not want to charge the customer **ANY** shipping charges, check the box labeled "Do not bill shipping". An example here would be a program where the cost of the shipping was included in the price of the product.

In both of these cases, you can still capture the shipping costs when you invoice the customer. You can also change or override the shipping price at that point as well.

The estimated **sales tax amount** as well as the taxable amount and the percentage are displayed for you. If this information is incorrect, you will need to go to one of the previous screens to correct it.

- If the tax percentage is wrong, go back to the general information screen and change the tax routine to the correct routine.
- If the taxable amount is wrong because one or more items should not be taxable, go back to the line item in question and change the setting of the "Taxable?" flag at the bottom of the screen.

Special mention should be made of the way to handle tax-exempt customers. The tax routine selected should have a zero tax percentage defined. However, you do **NOT** need to change the "Taxable" flag to "No" on all the line items. Since the percentage is zero, the amount of tax charged will be zero no matter what the taxable amount is. However, some states require that you report the amount of taxable sales regardless of the amount of tax actually collected. So, in general, the "Taxable" flag should be set independently of whether tax is to be charged or not.

You may note a **deposit made to the vendor**. This information can be printed on your purchase order. Note that this field is **ONLY** used for this purpose. It is **NOT** connected to the "deposits to vendors" feature in Accounts Payable and does not affect Accounts Payable at all.

You may also enter a **Customer deposit**. This can print on an acknowledgment. It will also transfer to the customer's invoice. It does **NOT** affect Accounts Receivable. Deposits received from the customer should be entered into the Accounts Receivable system separately.

Note that field to the right of the customer deposit labeled "used". This indicates how much of the customer's deposit has already been used on an invoice. If nothing has been billed, the used amount should be zero. If you do a partial billing and use only part of the deposit, the amount you use will be recorded in this field. When you do another invoice, the deposit remaining will be calculated as the original deposit less the amount used.

If you include credit card information on the order, there is a link to let you update this data from this screen. This is the same link as the one shown on the general information screen. It is also included here in case you prefer doing it from this screen.

Commission

You may choose to include a review of commission on the order screen. If you do **NOT** want the commission information included on the order screen, you will need to set the system option to suppress it.

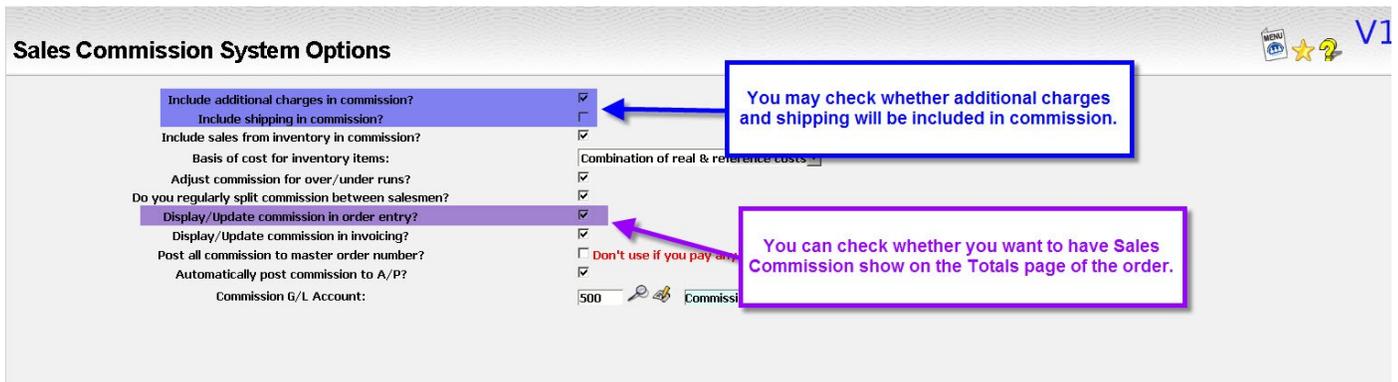


Illustration 17: Sales Commission System Options for Additional Charges/Shipping in Commission and Display Commission in Order

If you choose to include it, the total sales and cost that are used for commission purposes will be displayed. These may be different from the total shown above for a couple of reasons:

- If you use the separate additional charges feature, you may exclude these from commission.
- For shipments from inventory, you may choose to use the reference cost of the item instead of the actual cost.

The commission basis and the estimated commission is shown. You may change these fields if they appear to be incorrect or you have a special situation.

If the salesman is paid any commission when the order is placed, this amount will be placed in the "Advance" field. You may pay a salesman that is normally paid later an advance payment on a specific order by entering the amount you want to pay into the "Advance" field.

If the commission is set up to be split between two salesmen, the commission information will be shown for both.

When you finish entering the information on this screen, click on the "Next" button () to go to the next screen. You can also click on the "Previous" button () to go back to a previous item or the general information screen or click on the "Done" button () to go to the order overview.

Entering Comments and Instructions

There are five types of general comment information you can associate with the order:

| | |
|-----------------------------|---|
| Comments | General comments such as "Call Mary at 225-292-7422 with questions" |
| Imprint | General instructions regarding the imprint. This is in addition to or instead of line item imprint information. |
| Special Instructions | Any other special instructions you may want to include |

Vendor Instructions

Special instructions specifically for the vendor

Repeat Instructions

If this is a repeat order, information on the previous order such as vendor's job number. If you use the repeat order function, this will be generated for you automatically but you may then make any changes or additions you wish.

Having several comment areas lets you put information in different boxes on your documents. You can also put some of the information on one document but not on others. For example, you can put the vendor instructions on the purchase order but not the acknowledgment.

You should decide what types of comments you want to use and what type of information will go into each type of comment. Make sure everyone in the company uses the same routine.

Also, you should decide what types of comments should be used on each form. If you want to change what comments are included or not included on a particular form, contact Lakeshore Technical support. This is generally an easy change to make.

All of the comment areas can be up to 60 characters wide and up to 50 lines long. The size you want to use is set on the Order Processing system options. Most users restrict the length to 20 lines or less. You may want to restrict the width to fit better on a particular form.

The content of the comment area is basically free-form text. There are several editing icons available to let you do the following:

**Center text**

If you want only part of the text centered, highlight it by clicking on the starting point and dragging your mouse until the text you want to justify is highlighted. Then, click on the centering icon. If you do not highlight anything, ALL of the text will be centered.

**Left-justify text**

Similar to the centering technique except click on the left-justify icon.

**Right-justify text**

Similar to the centering technique except click on the right-justify icon

**Insert standard comments**

If you have comments or instructions you use frequently, you can predefine them and pull them into the order. To set up comments, go to

Reference Information

Miscellaneous codes, group 1

Standard Comments

To insert them into the comments area, click on where you want them to be inserted, then click on the look up icon and select the comment you want to include from the list.



Spell check text

You can check your spelling and make corrections.

Art #1

Insert art #1

If you have associated one or more art numbers with the order on the general information screen, you will see a link for each one listed. Click on the link to have a reference to the art number inserted into the comments area. When a document is printed, a thumbnail of the art will be included in that spot on the document.

Art

Look up & insert art

If you want to insert an art reference that you have not specifically linked to this order, click on either the underlined word "Art" or the look up icon. You can look up and select ANY art number and put a reference to it in the comments area.

Setting up and using art on your orders is described in more detail in the discussion on [using art on orders](#).

The Order Overview

After you have gone through all of the order screens, you will see the order overview screen. You can also get to this screen at any point by clicking on the "Done" button ().

This screen contains a summary of the order so that you can review it and make sure everything has been entered as you want it to be.

If you need to make changes, you can click on the pen/pencil update icon () beside a piece of information to go directly to the screen where you can change that information.

You can delete a line from the order by clicking on the trash can icon ().

If you need to add an additional line item, click on the "New" icon (**New**) at the end of the section showing the line items.

There are several links in the upper right of the screen that let you print or transmit various forms as well as give you access to other functions such as the job status of the order. These are described in detail in the help file for this screen.

When you are finished with the order, click on the "Exit" button () to exit the order.

| | | | | | |
|----------------------------------|---|---|---|---|---|
| Resequence lines | | Order Number: 711477   | | Quick Links: | |
| Pop up Notes | | Master Order Number: 711477 | | Quick send File copy Work order | |
| | | Current Status: Open | | Print/FAX/E-mail this order | |
| | | Order date: 5/18/12 | | A/P Tracking Job Status | |
| | | Ship date: 5/21/12 | | Scheduling | |
| Bill to: | ATTENTION INTERNATIONAL 5723 Superior Suite A2 Baton Rouge, LA 70816 | Final Ship to: | ATTENTION INTERNATIONAL 5723 Superior Suite A2 Baton Rouge, LA 70816 | Vendor: | Ship from inventory  |
| | Contact: Ms. Linda Keady Telephone: (225)292-7424/1000 E-mail: kkeady@lakeshoregroup.com | | Contact: Ms. Linda Keady Telephone: (225)292-7424/1000 E-mail: kkeady@lakeshoregroup.com | | |
| Line # 1 | WQXY WQXY T-SHIRT | | 8 @ \$5.00 = \$40.00 | |    |
| No charges on file | | | | | Show |
| Subtotal | | | | \$40.00 | |
| Sales tax (estimated) | | | | \$2.80 | |
| Total order | | | | \$42.80 |  |
| Releases: | No releases on file | | | |  |
| Comments | | | | |  |
| Imprint | | | | |  |
| Special instructions | | | | |  |
| Vendor instructions | | | | |  |
| Repeat message | | | | |  |

Illustration 18: Order Overview

MULTI-VENDOR ORDER

You sometimes have one order from one customer that requires that you place orders to multiple vendors. Each order is given the same **master order number**. This number ties all the various "tracking" orders together so you can look at the progress of the whole customer's order. You may also pull all the pieces together onto a single invoice by billing the master order.

An order that requires you to buy blank goods and decorate them is a typical example of a master order because you may want to enter an order to send to the blank goods vendor and one to send to the decorator. This application is so common that there are a special order entry routine for a *wearables order*.

You may also create a master order by just continuing to add additional orders in the *salesman order* form routine.

This discussion will cover how to enter a more generic master order such as when the customer orders mugs and pencils. These methods can also be used for wearables orders if you prefer.

There are two methods of entering master orders:

- **Update order file** - This option utilizes the same screens as those used for entering a single order or changing an order with some minor differences.
- **Quick order** - This option is similar but the screens are simplified. This may be an appropriate method for salesman or others who enter routine orders.

Some general information about entering master orders using either method:

- The master order is entered into a temporary area. Once you are ready to generate the order, you will click on a "generate" button and the various orders will be generated. Until you click on the "generate" button, no orders are posted to the actual order file.
- If you should have a problem during order entry or have to exit the order without finishing it, you may return to it on the same day and usually retrieve all of the data you have already entered. Simply ask to start a new multi-vendor order. If you have one already in progress, you will be asked if you want to retrieve that data or start over. These temporary files are cleared each night so you will usually not be able to retrieve a session from a previous day.
- One or more of the orders generated may be a "ship from inventory" or a "manufacture and ship" by entering a vendor number of 999999. You indicate on the system options for Order Processing whether or not you want the inventory-related orders to be a "ship from inventory" or a "manufacture and ship" order.
- All orders generated will be either a drop ship order or one of these inventory-related orders. You cannot enter an order for stock or a decoration order using this method.
- One order will be generated for each unique combination of the following:
 - Vendor (999999 is considered a vendor)

- Process group (if you use process groups)
 - Inventory location (if the vendor is 999999 and you use the multiple inventory location feature)
 - Master sequence number (if you have elected to have this option)
- You may use this method to generate a single order if you would like to standardize your order entry and always use this method.

Using the "Update order file" method

The first step is to request a "new" order from either the "Update order file" screen or the "Update Master Order" screen. Both take you to the same new order dialog screen. A new order is requested by clicking on the (**New**) icon.

When you get to the "new order" dialog screen, pick the "completely new multi-vendor order" option. No further information is required at this point.

Once you click the Submit button, the general information screen of the order will be displayed.

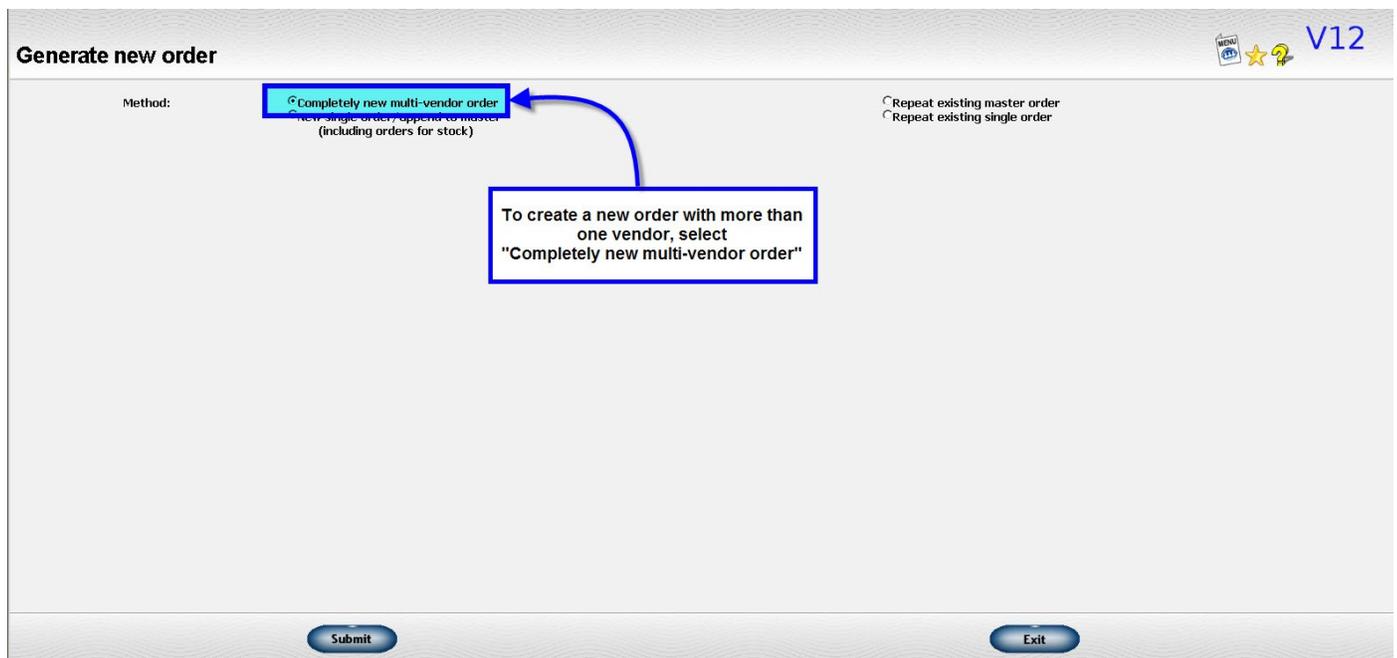


Illustration 19: Generate New Order Screen

Entering general information about the order

Once you click the Submit button, the general information screen of the order will be displayed. You will notice that there is no place to indicate the type of order or to enter a vendor or decorator. The type of order will be assigned to each order when they master order is generated. The vendor will be entered on each line item.

This discussion will concentrate on how this screen is different when you are entering a master order. Read the discussion on [entering general information about an order](#) for additional information on other fields that are not discussed.

There will be no **type of order** information requested. The type of order will be assigned to each order based on the vendor information entered on the corresponding line.

There will be no **vendor number** information requested. The vendor information will be picked up from the lines entered on subsequent screens.

Any **ship date** or similar information you enter will be used on **ALL** the orders in the master order. If this is not appropriate, you can enter this type of information later after the individual orders are generated **OR** you can enter it here and just change the data on the orders where it needs to be different.

The screenshot displays the 'Update master order' screen with the following elements:

- Header:** 'Update master order' on the left, 'Order Number: To be assigned' and 'General information' in the center, and 'V12' with icons on the right.
- Callouts:**
 - 'No "Type of Order" information requested.' (top left)
 - 'No Vendor or Decorator information requested.' (middle left)
 - 'No Process Groups are requested.' (middle right)
 - 'Sales Report Categories, Ship Date, and Ship Via will apply to all orders that are a part of the Master Order.' (bottom center, with arrows pointing to the Sales Report Categories, Ship Date, and Ship Via fields)
- Customer Section:** 'Customer:' field with a search icon and a link to 'Update other Customer-Related data'.
- Shipping Address Section:**
 - Fields: Attention, Company Name, Street Line 1, Street Line 2, City, State / Province, Postal Code, Country.
 - Links: 'Ship to Company Address', 'Ship to Multiple Addresses', 'Ship to Store Address', 'Enter Credit Card information', 'Update Art Numbers'.
- Other Information Section:**
 - Fields: Customer's Order Number, Job ID, Salesman, Order Status, Number Colors (1), Number up (1), Dstr PO#, Coop/Price Group, Tax routine, Program Number, Store.
 - Buttons: 'Open' (next to Order Status).
- Sales Report Categories Section:** Four numbered input fields (1-4) with search icons.
- Dates / Shipping information Section:**
 - Fields: Event Date, "In Hand" Date, Ship Date, Follow up Date (5/30/2012), Special Handling (No), Pick up Time, Ship Via (01 UPS GROUND), Dealer Due on, Prepaid/Collect (Prepaid/Inside), B/O Handling (Ship as available), Repeat Date (1 yr).
 - Link: 'Update other Dates & Information'.
- Navigation:** 'Previous', 'Exit', 'Done', 'Next' buttons at the bottom.

Illustration 20: General Information Screen of Multi-Vendor Order

Entering line item information

Once you complete the general information screen and move to the line items, you will also notice a few differences here also.

The main difference will be some new fields that appear to the right of the description. There will be between one and four of these depending on your system options.

- **Vendor number** - You will always be prompted for the vendor number that is associated with this line item.
- **Location** (optional) - If you use multiple inventory locations **AND** if you enter the vendor number as 999999 (or click on the  icon), you will be prompted for the location associated with this line item.
- **Process Group** (optional) - If you use the scheduling routines available in the system **AND** have more than one set of processes, you will be prompted for the process group to use for this line item.
- **Master Sequence #** (optional) - If you have multiple line items for the same vendor or for inventory but want separate orders generated for them, you can assign a sequence to each one that you want separated. This is primarily used by suppliers who want to put each line item on a separate work order.

For example, suppose you have an order for items A, B, and C. You want items A and C on one work order and item B on another. You would enter a Master Sequence # of 1 to the lines for A and C and a Master Sequence # 2 on the line for item B.

Except for these extra fields, enter the data as you would for any order.

If you use the additional charges option, you will also be prompted for the same additional information on those screens as well.

Order Number: To be assigned

MENU V12

Update master order

Line Item # 1

Item Number:

Description: *

[Individual Imprint](#)

Quantity Ordered: *

Pricing Unit:

List Price:

Cost:

Selling Price:

Zero Cost Print Format: Print as '.00' Print as 'N/C' Leave Blank Don't print the Line User-Defined

Zero Sell Print Format: Print as '.00' Print as 'N/C' Leave Blank Don't print the Line User-Defined

Taxable?

Item Report Category:

Design Number:

Vendor Number: *

Process Group:

Discount Code: %

Unit Amount Extended

[Schedule this order](#)

Special fields used only when entering Multi-vendor orders.

Links to entering comments and instructions that apply to the vendor, etc. on THIS screen only.

Quick Links

- [Update comments](#)
- [Update imprint](#)
- [Update special instructions](#)
- [Update vendor instructions](#)
- [Update notes](#)

Previous Exit Done Next

Illustration 21: Item Screen for Multi-Vendor Order

Vendor #274000 Fantastic Lures
Process Group #06 NO PROCESSES

MENU V12

Master Order

Comments

These comments will only be on the Fantastic Lures order with process group 06 - No Processes

Save Reset Exit

Illustration 22: Comment Screen for Single Order of Master Order

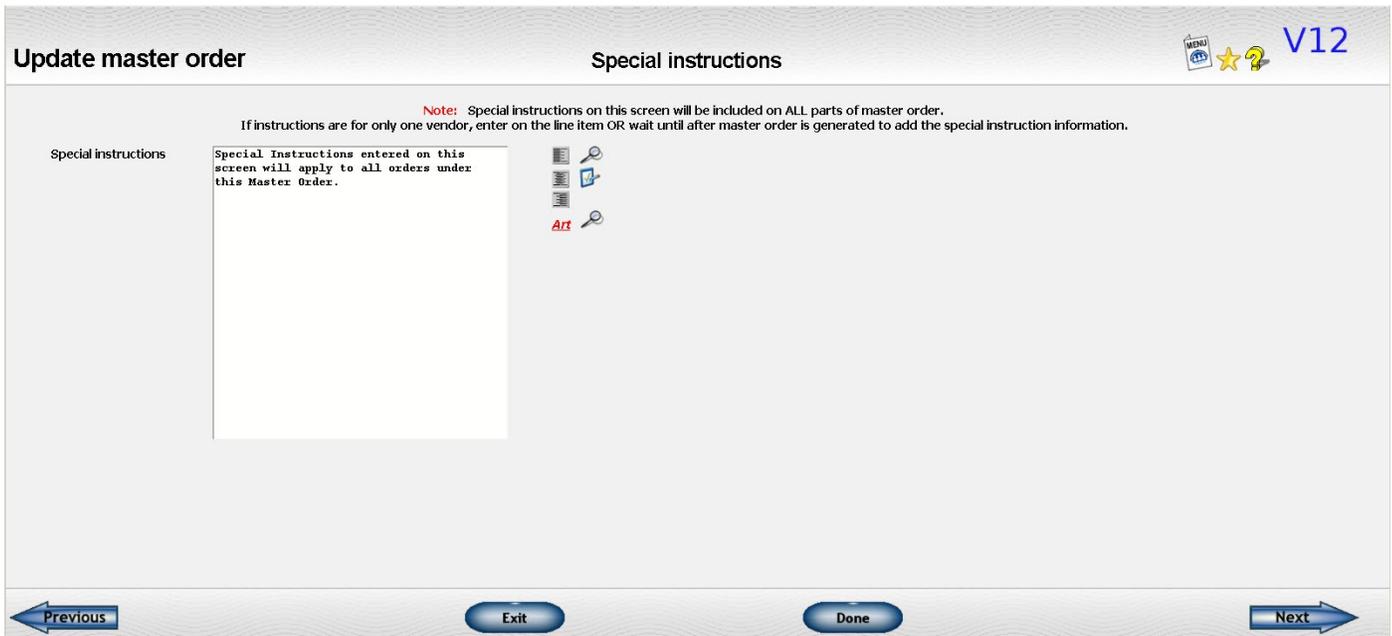


Illustration 23: Special Instruction Screen for All Orders of Master Order

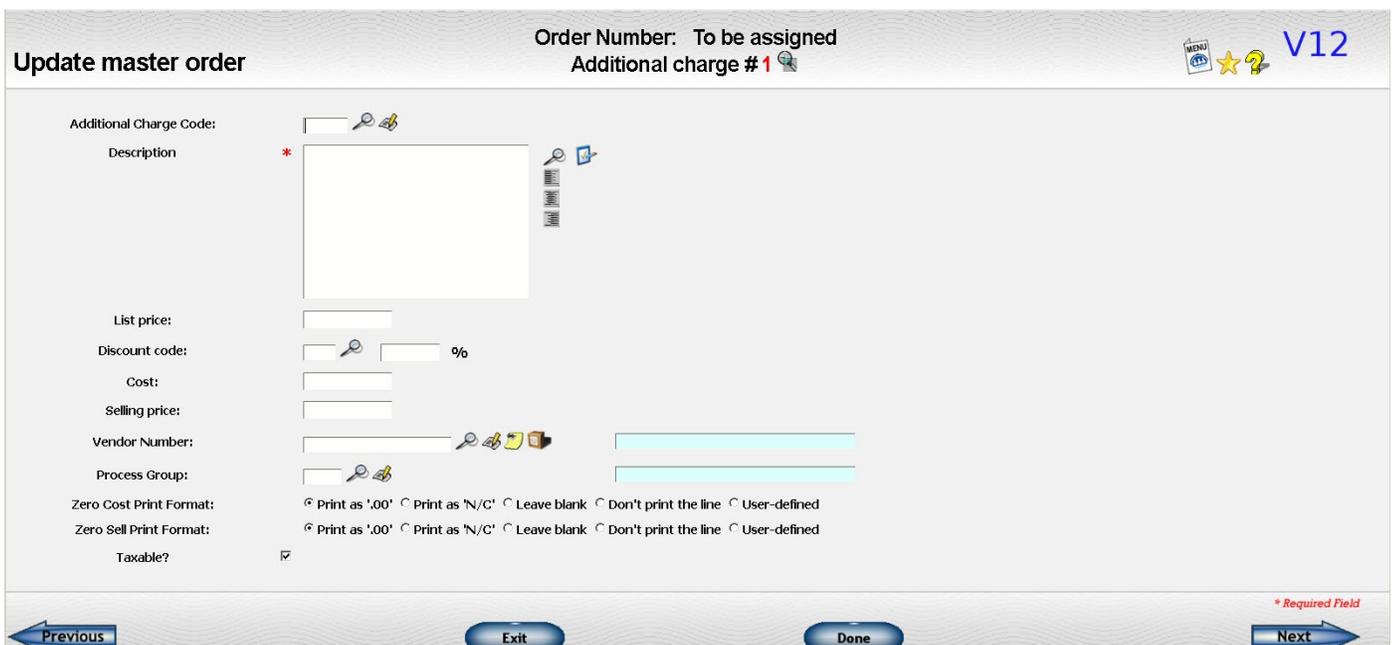


Illustration 24: Additional Charge Screen of Master Order

Generating the master order

Once you finished entering all your line items and charges and any comments or instructions you want included on all the orders, press the "Done" key to go to the overview.

Review the order one last time.

If you see a problem with the order and you want to abort the whole process, click on the "Exit" button. **If you click on the Exit button, you may lose all of the information you have just entered.**

If the order looks complete, click on the "Generate" button to actually generate the order. You will be asked "are you sure?" in case you clicked the wrong button. Once you indicate you want to proceed, you will go to a screen that lists summary information on the orders that will be generated. You are given once last chance to retreat and fix the master order information. If you click the "Submit" key, then the master order will be generated. All orders within the master order will be displayed. You can make changes to any part of it at that point.

Generate master order

Click here to generate the orders

Order Number: To be assigned

Generate

Bill to: Gary French
French's Bait Shop
123 River Basin Road
Baton Rouge, LA 70816

Final Ship to: Gary French
French's Bait Shop
123 River Basin Road
Baton Rouge, LA 70816

Contact: Mr. Gary French
Telephone: (123)123-1234
E-mail: gary@lakeshoregroup.com

| Line # | Item | Quantity | Price | Total | Vendor | Process |
|----------|--|----------|--------|---------|-----------------|------------------|
| Line # 1 | fl-1 Lake Fork 5" Swim Bait 3 pk Pumpkin | 10 | \$6.75 | \$67.50 | Fantastic Lures | NO PROCESSES |
| Line # 2 | fl-2 Mini Rattle Trap Chartruese | 1 | 0.85 | 0.85 | Fantastic Lures | NO PROCESSES |
| Line # 3 | ghf-7 Gizmo | 1 | 0.00 | 0.00 | Gizmos R Us | DROP SHIP |
| Line # 4 | ghf-8 Flakey Frog | 1 | 5.00 | 5.00 | Fantastic Lures | DROP SHIP |
| Line # 5 | ghf-9 Whatchama Callit | 1 | 0.00 | 0.00 | Gizmos R Us | Gary's Engraving |

An order will be generated for each combination of vendor and process group.

- 1st order - Fantastic Lures - No Processes
- 2nd order - Gizmos R Us - Drop Ship
- 3rd order - Fantastic Lures - Drop Ship
- 4th order - Gizmos R Us - Gary's Engraving

Subtotal: \$1,152.35
Total order: \$1,152.35

Comments and Instructions that appear in this section will be entered on all orders that are generated by this multi-vendor order.

Exit **Next**

Illustration 25: Master Order Overview Before Orders are Generated

Generate Master Order

New master order number:

Include this order?

- Fantastic Lures
NO PROCESSES
- Gizmos R Us
DROP SHIP
- Fantastic Lures
DROP SHIP
- Gizmos R Us
Gary's Engraving

New order number(s):

Leave master order number/order number(s) blank to let system assign numbers

← Back

Submit

Exit

Illustration 26: Final Recap of Master Order

Update Master Order V12

Master Order Number: **711646**

Master Order: 711646 **Quick Links:** Master Acknowledgment, Master Allocation order, Master work order, Master sales order

Resequence Lines Order Number: 711646

Current Status: Open Quick Send File Copy Work order Print/FAX/E-mail this order Job Status Scheduling

Order date: 8/9/12 Ship date: 9/5/12

| | | |
|---|---|---|
| Bill to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Ship to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Vendor: Bill Dance Fantastic Lures 19402 Lakeside Drive Lake Charles, LA 70601 Contact: Mr. Bill Dance Telephone: (225)292-7422 E-mail: sales@lakeshoregroup.com E-mail/Art: sales@lakeshoregroup.com |
|---|---|---|

| | | | |
|----------|-----|---------------------------------------|-----------------------|
| Line # 1 | 8-1 | Lake Fork 3" Swim Bait 3 pk Chartruse | 10 @ \$6.75 = \$67.50 |
| Line # 2 | 8-2 | Mini Battle Trap Chartruse | 15 @ \$3.99 = \$59.85 |

No charges on file

| | |
|-----------------------|-----------------|
| Subtotal | \$127.35 |
| Sales tax (estimated) | \$10.82 |
| Total order | \$138.17 |

Releases: 1 release on file

Comments: These comments will only be on the Fantastic Lures order with process group 06 - No Process

Inprint: [icon]

Special instructions: These Special Instructions will appear on all orders that are part of this master order.

Vendor instructions: [icon]

Repeat message: [icon]

Resequence Lines Order Number: 711647

Current Status: Open Quick Send File Copy Work order Print/FAX/E-mail this order Job Status Scheduling

Order date: 8/9/12 Ship date: 9/5/12

| | | |
|---|---|---|
| Bill to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Ship to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Vendor: Gismo R Us 940 Whitthamsall Lane Bossier LA 70605 Contact: [icon] Telephone: [icon] E-mail: info@lakeshoregroup.com E-mail/Art: gfr@lakeshoregroup.com |
|---|---|---|

| | | | |
|----------|-------|-------|-------------------------|
| Line # 1 | gfr-7 | Gismo | 100 @ \$2.00 = \$200.00 |
|----------|-------|-------|-------------------------|

No charges on file

| | |
|-----------------------|-----------------|
| Subtotal | \$200.00 |
| Sales tax (estimated) | \$17.00 |
| Total order | \$217.00 |

Releases: 1 release on file

Comments: [icon]

Inprint: [icon]

Special instructions: These Special Instructions will appear on all orders that are part of this master order.

Vendor instructions: [icon]

Repeat message: [icon]

Resequence Lines Order Number: 711648

Current Status: Open Quick Send File Copy Work order Print/FAX/E-mail this order Job Status Scheduling

Order date: 8/9/12 Ship date: 9/5/12

| | | |
|---|---|---|
| Bill to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Ship to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Vendor: Bill Dance Fantastic Lures 19402 Lakeside Drive Lake Charles, LA 70601 Contact: Mr. Bill Dance Telephone: (225)292-7422 E-mail: sales@lakeshoregroup.com E-mail/Art: sales@lakeshoregroup.com |
|---|---|---|

| | | | |
|----------|-------|-------------|------------------------|
| Line # 1 | gfr-8 | Flakey Frog | 75 @ \$5.00 = \$375.00 |
|----------|-------|-------------|------------------------|

No charges on file

| | |
|-----------------------|-----------------|
| Subtotal | \$375.00 |
| Sales tax (estimated) | \$31.68 |
| Total order | \$406.68 |

Releases: 1 release on file

Comments: [icon]

Inprint: [icon]

Special instructions: These Special Instructions will appear on all orders that are part of this master order.

Vendor instructions: [icon]

Repeat message: [icon]

Resequence Lines Order Number: 711649

Current Status: Open Quick Send File Copy Work order Print/FAX/E-mail this order Job Status Scheduling

Order date: 8/9/12 Ship date: 9/5/12

| | | |
|---|---|---|
| Bill to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Ship to: Gary French French's Ball Shop 123 River Basin Road Baton Rouge, LA 70816 Contact: Mr. Gary French Telephone: (123)123-1234 E-mail: gary@lakeshoregroup.com | Vendor: Gismo R Us 940 Whitthamsall Lane Bossier LA 70605 Contact: [icon] Telephone: [icon] E-mail: info@lakeshoregroup.com E-mail/Art: gfr@lakeshoregroup.com |
|---|---|---|

| | | | |
|----------|-------|----------------|-------------------------|
| Line # 1 | gfr-9 | Whitthams Call | 25 @ \$18.00 = \$450.00 |
|----------|-------|----------------|-------------------------|

No charges on file

| | |
|-----------------------|-----------------|
| Subtotal | \$450.00 |
| Sales tax (estimated) | \$38.25 |
| Total order | \$488.25 |

Releases: 1 release on file

Comments: [icon]

Inprint: [icon]

Special instructions: These Special Instructions will appear on all orders that are part of this master order.

Vendor instructions: [icon]

Repeat message: [icon]

[Exit] [Next]

Illustration 27: Overview of Master Order After Order Is Generated

Using the "Quick Order" method

The steps are similar but the screens are more simplified. You can indicate in the Order Processing system options that you don't need some of the fields included. If you do not put them on the screen, then they will default to blank or to the appropriate value (such as salesman will default to the salesman on the customer file).

Illustration 28: Order Processing Systems for Short and Quick orders

Illustration 29: General Information Screen of Quick Order

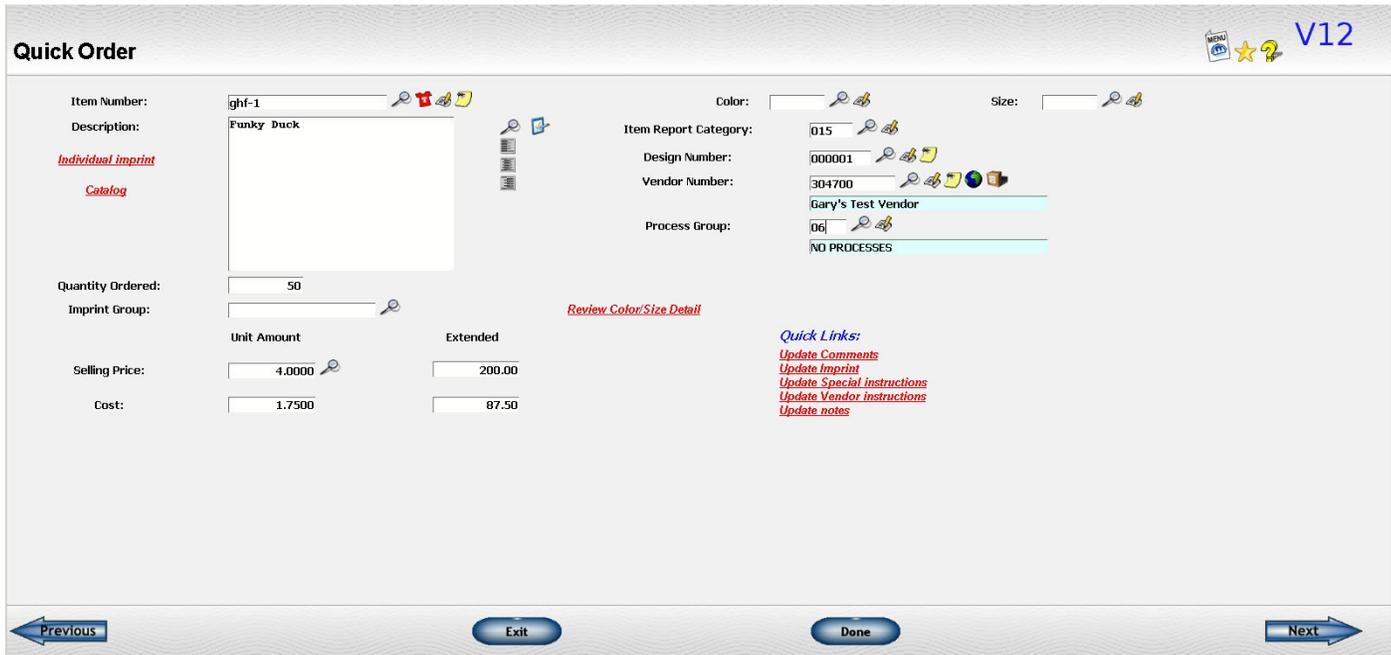


Illustration 30: Line Item Screen for Quick Order

APPENDING AN ORDER TO A MASTER ORDER

Sometimes you will need to add another order to an existing master order. This is easy to do.

- Ask to add a new order.
- Enter the master order number to which you want to add the new order.
- When the order is generated, a new order number is assigned.
- The customer, customer order number, ship date, and most of the general information information from the master order will be copied into the new order.

NO vendor or line item information will be included.

Comments and instructions from the first order in the master order **WILL** be copied into the new order.

You may change anything on the new order you wish.

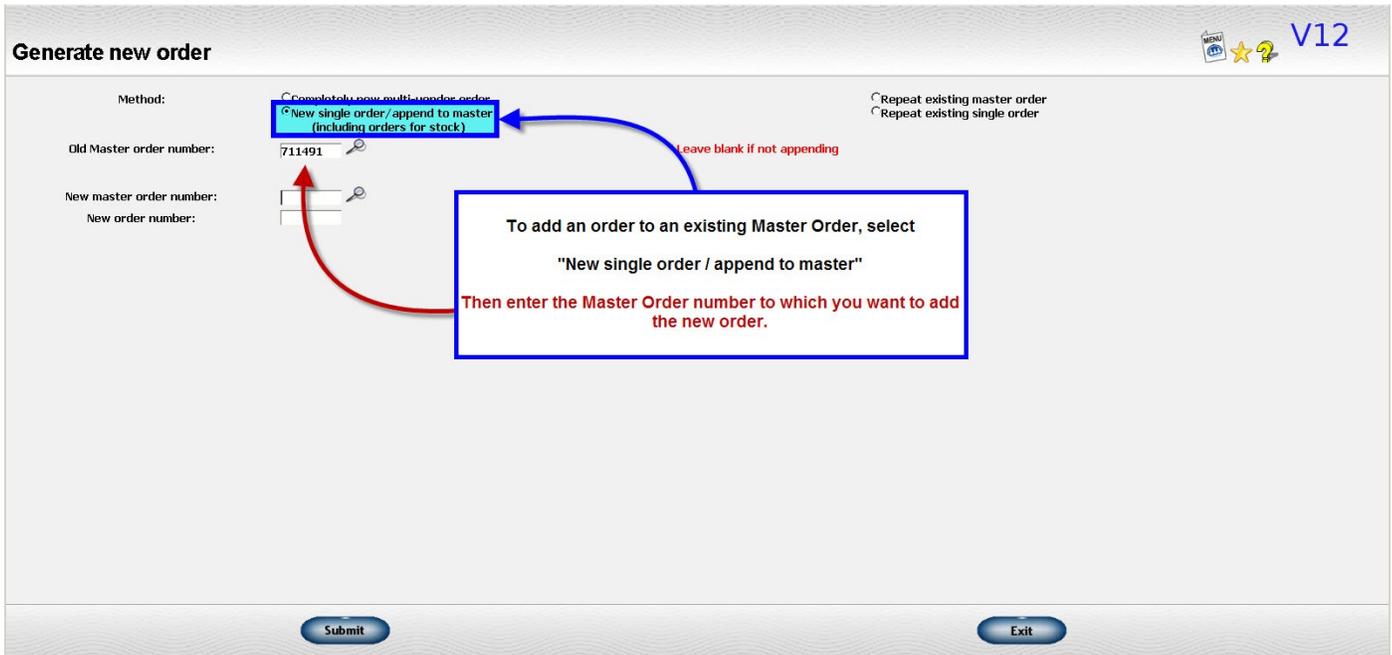


Illustration 31: Generate New Order Screen Flagged to Append to a Master Order

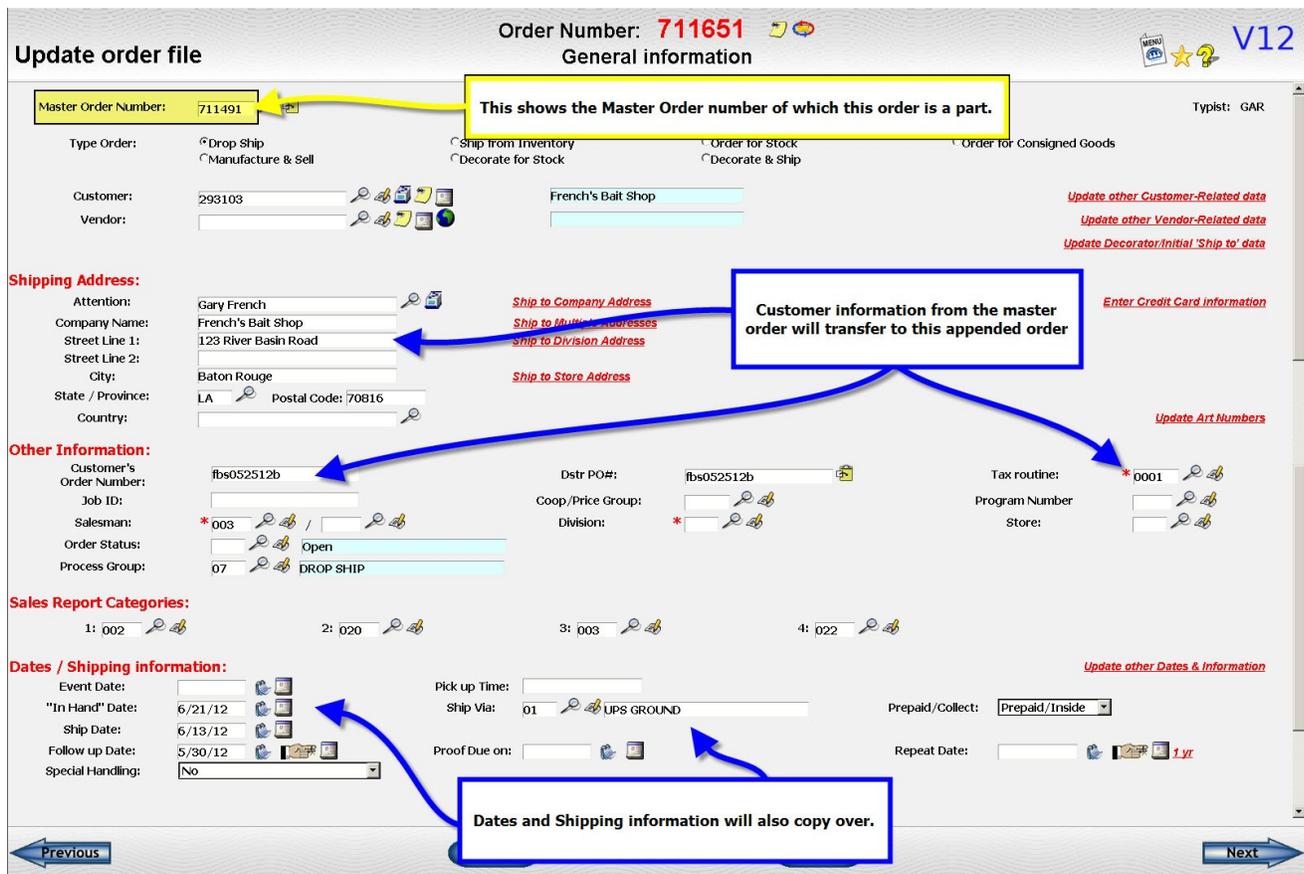


Illustration 32: General Information Screen of Order Showing Data Copied from Master to the Appended Order

REPEATING ORDERS

Repeating an Existing Single Order

A customer will frequently ask to repeat an order you have already done for him. Or, you may have a new order that is very similar to one you have already done. You can use the "repeat" option to generate a new order with most of the data from the original order.

Here are the steps to generate a new order:

1. Ask to add a new order.
2. Ask to repeat a single order and enter the order number you want to repeat.
3. Review the repeat options and make any appropriate changes.
4. Submit your request.

The screenshot shows the 'Generate new order' interface. At the top right, there is a 'V12' version indicator. A blue box labeled 'Select Repeat Single Order' has an arrow pointing to the 'Repeat existing single order' radio button under the 'Method' section. The 'Method' section includes options for 'Completely new multi-vendor order', 'New single order/append to master (including orders for stock)', 'Repeat existing master order', and 'Repeat existing single order'. Below this, there are input fields for 'Old order number' (containing '711359'), 'New master order number', and 'New order number'. A green arrow points from the 'Old order number' field to the 'Repeat options' section. The 'Repeat options' section is highlighted with a purple box and contains several checkboxes: 'Use current vendor address?' (checked), 'Use current customer billing & acknowledgment information?' (checked), 'Use same shipping address as on original order? (If unchecked, shipping address on customer file will be used)' (checked), 'Use current prices (if available)?' (checked), 'Copy any notes?' (unchecked), 'Copy any multiple shipping addresses?' (unchecked), 'Copy any WIP scheduling & set up information?' (unchecked), and 'Copy any art numbers?' (checked). A purple arrow points from the 'Repeat options' section to a blue box containing the text: 'Enter the order number that you want to repeat, then review the Repeat Options. Click Submit when you have the options you wish.' A red arrow points from this box to the 'Submit' button at the bottom left. The 'Exit' button is at the bottom right.

Illustration 33: Generate New Order Screen Marked to Repeat Single Order

5. A new order is generated with a new order number.
6. Most of the information from the original order will be copied into the new order.

The following information will **NOT** be transferred to the new order.

- In hand and ship date
- Salesman number
- Credit terms
- Tax routine

On the line items, the quantity shipped is cleared and the quantity remaining set to the the quantity ordered.

You may change anything on the new order you wish.

You may also repeat an order by clicking on the clipboard icon on one of the "Display order by" routines such as "Display orders by Customer". If the order is part of a multi-vendor order, all the orders in the master order will be displayed and you can pick and choose which ones to repeat.

IMPORTANT! If you change the type of order, be sure to review the order carefully since the new type of order may have different requirements from the old order.

For example, if you repeat an order for stock and change the type of order to a drop shipment, the new order will not have any selling prices.

| Display orders by customer | | Customer # 296800 Funky Fun Things | | MEMBER | |
|---|--|---|--|------------------|------------------------------|
| Order # | Vendor | Dates | Shipping address | First five items | |
| <u>715769</u> Complete 📄 ↻ 📋 | Manufacture & sell | Order: 6/21/18 Ship: 6/25/18 | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 50 | PLAQUE |
| <u>715768</u> <u>(715766)</u> Open 📄 ↻ 📋 | ACCURATE PRI | | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 80 | Screening 1 SCREEN CHARGE |
| <u>715767</u> <u>(715766)</u> Open 📄 ↻ 📋 | BRODER BROT Ship to: ACCURATE PRINTING | Ship: N/A | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 40 | Tote Bag |

Click the clipboard icon to repeat this order.
If this is a Master Order, all orders of the Master Order will be listed. You can generate the full master order, or only parts of it.

Illustration 34: Repeat Order from One of the "Display" Options

A repeat message is automatically generated for the new order, with references to the previous order. You may adjust or delete the message as appropriate.

The defaults for the repeat options are specified in the Order Processing system options. You should set these to coincide with the option settings you normally use.

Order Processing System Options

Item number?

Selling price?

Cost?

Use unit price/cost or extended? Unit Extended Both unit and extended

Pricing unit (If entering unit prices)?

Ask for deposit?

Ask for Credit Card information?

Ask for number of labels?

Show shipping address on main screen?

Options for restricted order entry for salesmen:

Set special order status? Review Status: 98

Send e-mail?

Other options:

If item not on item file, search orders?

Defaults for repeat order:

Use current vendor address?

Use current customer address?

Use same shipping address?

Use current prices (if available)?

Copy any notes?

Copy any multiple shipping addresses?

Copy any WIP scheduling & set up information?

Copy any art numbers?

These define the default values used when you repeat an order.

Illustration 35: Order Process System Options for Defining Default Values for Repeat Orders

Repeating an Existing Master Order

A customer will frequently ask to repeat an order you have already done for him. Or, you may have a new order that is very similar to one you have already done.

Sometimes the original order required multiple vendor orders so that you need to repeat some or all of the orders in the original master order. You can use the "repeat master" option to generate a new master order with most of the data from the original order.

Here are the steps to generate a new master order:

1. Ask to add a new order.
2. Ask to repeat a master order and enter the master order number you want to repeat.
3. Review the repeat options and make any appropriate changes.

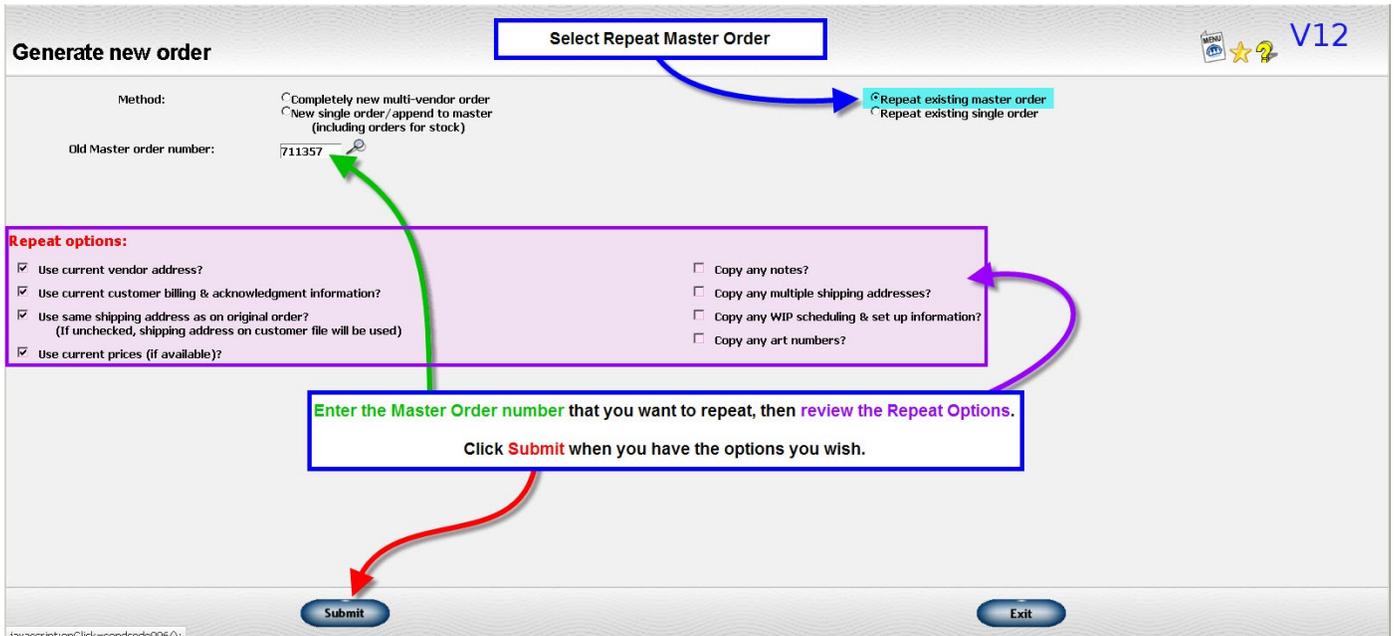


Illustration 36: Generate New Order Screen Flagged to Repeat Master Order

4. Submit your request.
5. Indicate what orders in the original master order should be included in the new order. The default is to include all of them.

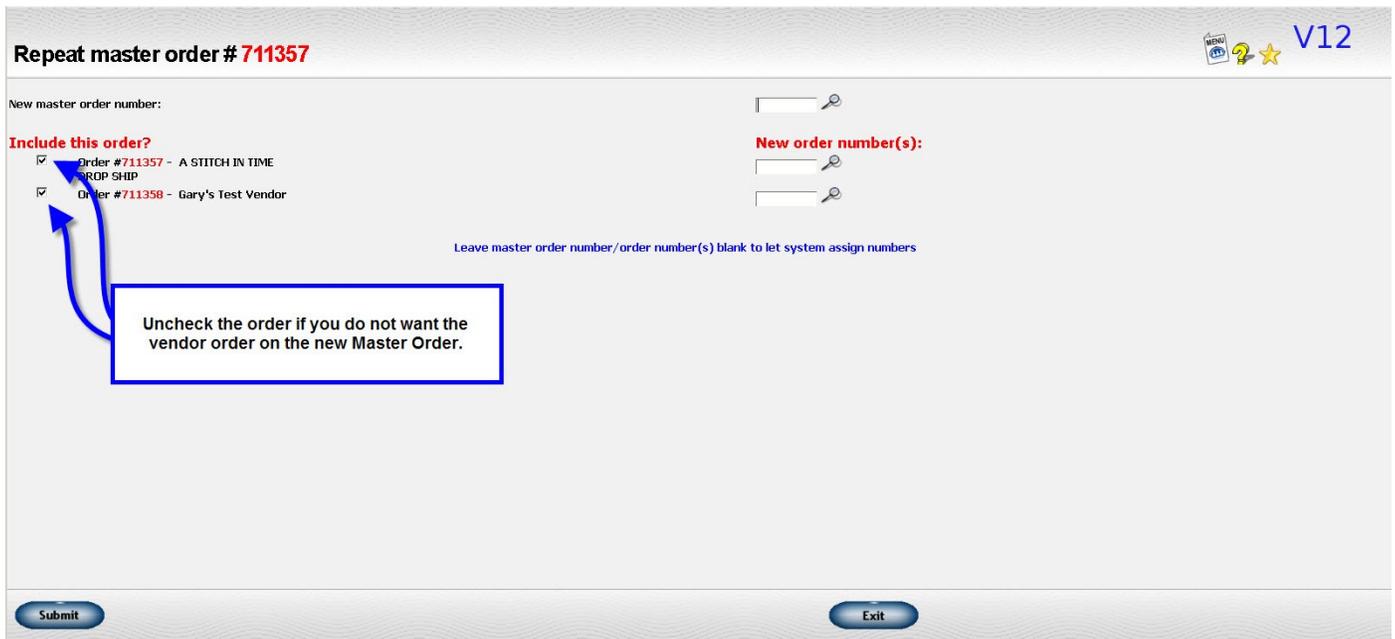


Illustration 37: Repeat Master Order Recap

6. A new master order is generated with a new master order number and a new order number for each vendor order in that master order.
7. Most of the information from the original orders will be copied into the new orders.
8. An overview of the new master order will be displayed.

The following information will **NOT** be transferred to the new orders.

- In hand and ship date
- Salesman number
- Credit terms
- Tax routine

On the line items, the quantity shipped is cleared and the quantity remaining set to the the quantity ordered.

You may change anything on the new orders you wish.

IMPORTANT! If you change the type of order, be sure to review the order carefully since the new type of order may have different requirements from the old order.

For example, if you repeat an order for stock and change the type of order to a drop shipment, the new order will not have any selling prices.

A repeat message is automatically generated for each order with references to the previous order. You may adjust or delete the message as appropriate.

Update Master Order

Master quick send

Master Order Number: 711506

Quick Links: Master acknowledgment, Master decoration order, Master work order, Master sales order, A/P

Resequence lines

Order Number: 711506, Current Status: Open, Order date: 5/25/12, Ship date:

Quick Links: Quick send, File copy, Work order, Print/FAX/E-mail this order, Tracking, Invoicing, Job Status, Scheduling

Pop up Notes

Bill to: Gary French, French Nights, 562 S. Flannery Rd, Baton Rouge, LA 70815, Contact: Telephone: E-mail:

Ship to: Gary French, French Nights, 562 S. Flannery Rd, Baton Rouge, LA 70815, Contact: Mr. Gary French, Telephone: (337)529-7080, E-mail: gfrench68@gmail.com

Vendor: A STITCH IN TIME, 14141 Harrell's Ferry Road, Baton Rouge, LA 70816, Contact: Telephone: (504)555-0111 & (504)555-0112, E-mail: kayek@lakeshoregroup.com, E-mail/Art: kayek@lakeshoregroup.com

Line # 1 SCREEN SCREEN CHARGE

1 @ \$25.00 = \$25.00

No charges on file

Subtotal, Sales tax (estimated)

\$25.00, \$2.13

Total order

\$27.13

Releases: No releases on file

Comments: 5% MULTI-STATION CLIENT DISCOUNT TO BE APPLIED TO BANNERS.

Imprint: Imprint on back of duck.

Special instructions

Vendor instructions

Repeat message REPEAT OUR #711357 DATED 11/11/11

Repeat Message automatically generated.

Resequence lines

Order Number: 711507, Current Status: Open, Order date: 5/25/12, Ship date:

Quick Links: Quick send, File copy, Work order, Print/FAX/E-mail this order, Tracking, Invoicing, Job Status, Scheduling

Pop up Notes

Bill to: Gary French, French Nights, 562 S. Flannery Rd, Baton Rouge, LA 70815, Contact: Mr. Gary French, Telephone: (337)529-7080, E-mail: gfrench68@gmail.com

Ship to: Contact: Gary French, Telephone: (337)529-7080, E-mail: gfrench68@gmail.com

Vendor: Donald Duck, Gary's Test Vendor, 1837 Quack Lane, Baton Rouge, LA 70816, Contact: Mr. Gary French, Telephone: (111)222-3333, E-mail: info@lakeshoregroup.com

Vendor ships to: A STITCH IN TIME, 14141 Harrell's Ferry Road, Baton Rouge, LA 70816, Contact: Joe, Telephone: (504)555-0111 & (504)555-0112, E-mail/Order: kayek@lakeshoregroup.com, E-mail/Art: kayek@lakeshoregroup.com

Line # 1 ghf-1 Funky Duck

75 @ \$7.00 = \$525.00

Adult 15 Extra Small, 15 Small, 15 Medium, 15 Large, 15 X-Large

Line # 2 ghf-1 Funky Duck

45 @ \$10.00 = \$450.00

Plus 15 2X-Large, 15 3X-Large, 15 4X-Large

No charges on file

Sales tax (estimated), Total order

\$82.88, \$1,057.88

Releases: No releases on file

Comments: 5% MULTI-STATION CLIENT DISCOUNT TO BE APPLIED TO BANNERS.

Imprint

Special instructions

Vendor instructions

Repeat message REPEAT OUR #711358 DATED 11/11/11

Exit

Next

Illustration 38: Master Order Overview with Repeat Message

You may also repeat an order by clicking on the clipboard icon on one of the "Display order by" routines such as "Display orders by Customer". If the order is part of a multi-vendor order, all the orders in the master order will be displayed and you can pick and choose which ones to repeat.

| Display orders by customer | | Customer # 296800 Funky Fun Things | | |
|--|--|---|--|---------------------------------|
| Order # | Vendor | Dates | Shipping address | First five items |
| 715769 Complete | Manufacture & sell | Order: 6/21/18 Ship: 6/25/18 | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 50 PLAQUE |
| 715768 (715766) Open | ACCURATE PRI | | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 80 Screening 1 SCREEN CHARGE |
| 715767 (715766) Open | BRODER BROT Ship to: ACCURATE PRINTING | Ship: N/A | Ray Beam Funky Fun Things 1234 Fun Time Lane Thibodeaux, LA 70827 | 40 Tote Bag |

Click the clipboard icon to repeat this order.

If this is a Master Order, all orders of the Master Order will be listed. You can generate the full master order, or only parts of it.

Illustration 39: Repeat Order from One of the "Display" Options

The defaults for the repeat options are specified in the Order Processing system options. You should set these to coincide with the option settings you normally use.

Order Processing System Options

Item report category:

- Item number?
- Selling price?
- Cost?
- Use unit price/cost or extended? Unit Extended Both unit and extended
- Pricing unit (If entering unit prices)?
- Ask for deposit?
- Ask for Credit Card information?
- Ask for number of labels?
- Show shipping address on main screen?

Options for restricted order entry for salesmen:

- Set special order status?
- Send e-mail?

Other options:

- If item not on item file, search orders?
- Defaults for repeat order:
 - Use current vendor address?
 - Use current customer address?
 - Use same shipping address?
 - Use current prices (if available)?
 - Copy any notes?
 - Copy any multiple shipping addresses?
 - Copy any WIP scheduling & set up information?
 - Copy any art numbers?

These define the default values used when you repeat an order.

Illustration 40: Order Process System Options for Defining Default Values for Repeat Orders