

SALESMAN ORDER FORM

For years we have been hearing that the order entry screens are fine for those who enter orders all the time but are too complicated for salesmen or other occasional users. "We'd like it to look just like a paper order form". So here it is, the "salesman" order format which looks very much like a paper form. We think more than just salesmen will like it!

There are a few restrictions:

- 1) You cannot enter the following types of orders
Order for stock
Decorate for stock
- 2) On shipments from inventory, the quantities will be allocated or backordered as stock is available but you cannot make any adjustments.
- 3) You cannot use the specialized types of items like bill of materials, color/size list, piggyback items, or trigger items.
- 4) Once the order has initially been generated, you cannot go back and change the vendor from inventory to a specific vendor or from a specific vendor to inventory.
- 5) On "decorate and ship" orders, the same description is used for the blank goods and the decorated item.

When you ask for this format, you will be prompted for a master order number. You can enter an existing master order number or you can click on the **New** icon (**New**) to start a new order.

If you ask for a new order, you will see the following dialog screen:

Generate new order

MENU ★ ? 

Method: Completely new order
 Repeat existing order

New master order number:  * Leave blank to let system assign

Is this a wearable order?

Is this a Decorate & Ship order?

If you ask to repeat an order, the entire master order will be repeated.

If you ask for a wearable order, you will go to the "Enter wearable order" function. It is included here in case you want to use the Salesman Order Form as your standard order entry function.

The Decorate and Ship option will add additional prompts to the line items on the screens for the decorator's cost.

If you enter an existing master order number, a summary of all of the sales orders in the master order will be displayed. You can click on the exact order number you need to update. Or, click on the "New" to add a new sales order to the existing master order.

Overview of Master Order # 708909






Sales Order #	Customer/Vendor	Dates	Shipping address	First item	Sales Cost	Links to other functions
					Profit	
708909	Customer: WHITMAN LIGHTING CENTER Vendor: A STITCH IN TIME Ship to Customer	Order 10/8/08 Ship 11/11/08 In Hand	WHITMAN LIGHTING CENTER 1237 Sherwood Forest Blvd. Baton Rouge, LA 70816 Customer order #: WLC080852	96 Embroidery	40.00 131.00 -91.00 -227.50 %	  
708910	Customer: WHITMAN LIGHTING CENTER Vendor: SANMAR Ship to A STITCH IN TIME	Order 10/8/08 Ship 10/13/08 In Hand	WHITMAN LIGHTING CENTER 1237 Sherwood Forest Blvd. Baton Rouge, LA 70816 Customer order #: WLC080852	72 Stedman by Hanes Jersey Knit	1195.20 549.12 646.08 54.06 %	   
New	Add a new order to this master order					



If you are entering a new master order, you will go directly to the first order and will not see this screen. The order number is assigned at this time. This number will be used even if you click on the Exit button.

Most of the information about the requested order are displayed on this screen. This includes information such as the customer, the vendor, the shipping address, and the items ordered. The pieces of information that are most frequently changed are included on this window. Links to additional windows let you adjust other information that is less frequently changed.

The fields updated on this window are described in detail in the discussion below. A sample order is shown on the next page.

To display the function of any icon or button, move your mouse on top of the area but do not click. A "tool tip" message will explain the purpose of that particular icon or button. Links to secondary screens where you can enter changes to specific data are shown in red and underlined.



Sales Order #	708910	Master Order #	708909
Order Date	10/8/08	Current status:	Open
Customer's P/O #	WLC080852		
Job ID		Program #	
Process Group	07	DROP SHIP	
Ship Via	01	UPS Groundtrac	
In Hand Date		Requested Ship Date:	10/13/08
Follow up Date:	10/14/08		
Report Categories	1: 002	2: 001	3: 005 4: 022
Art:	1: 001089	2:	3: 4:



Bill to:
900000
WHITMAN LIGHTING CENTER
P O Box 542
Baton Rouge, LA 70816
[Update this information](#)

Final Ship to Address:
WHITMAN LIGHTING CENTER
1237 Sherwood Forest Blvd.
Baton Rouge, LA 70816
[Update this information](#)

Vendor:
770401
Sanmar
30500 SE 79TH ST
Issaquah, WA 98027
[Web site](#)
[Update this information](#)

Vendor ships to:
A STITCH IN TIME
14141 Harrell's Ferry Road
Baton Rouge, LA 70816
Ship to address shown above
or
Decorator
000050
[Update this information](#)

Line	Item number	Quantity	Description	Unit Cost	Extended Cost	Unit Price	Extended Price
1	0504	72	Stedman by Hanes Jersey Knit Sport Shirt with Pocket. Color: Deep Royal Imprint information for this item	5.33	383.76	11.80	849.60
2	0504	24	Stedman by Hanes Jersey Knit Sport Shirt with Pocket. Color: Deep Royal Imprint information for this item	6.89	165.36	14.40	345.60
3			Imprint information for this item				
4			Imprint information for this item				
5			Imprint information for this item				

[Add additional line](#)

Total merchandise		549.12		1195.20
Estimated shipping				
Estimated sales tax of 8.5000 %				101.59
Estimated grand total		549.12		1296.79
Terms: NET 30 DAYS	Credit card	Deposit	Vendor	Customer

Art 1 Comments for Customer

Art 1 Special Instructions

Art 1 Imprint

Art 1 Vendor's Instructions

[Update repeat message](#)

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Exit

Done

Next →

General Information

Two "order numbers" are displayed at the top of the screen. If you require multiple purchase orders to fulfill one customer order, an order number is assigned to each vendor's order. This is so you can track the progress of each of these orders. This order number is displayed in red at the top of the screen and labeled as the **Sales Order#**. A single number is assigned that ties all of the sales orders related to a single customer order together. This number is called the **master order number** and it is displayed in blue at the top of the screen.

The fields (pieces of data) that you see on this screen are ones that you frequently will need to change on a new order such as ship date or ship method. Data that you usually do not have to change such as tax routine or credit terms code is still accessible by clicking on a link or **update** icon (). Since all the various lines of an address take up a bit of room, address changes are also made through these secondary screens.

For additional details on individual fields, click on the [Help](#) link. A few fields that users frequently have questions about are discussed here.

ORDER DATE - The order date will default to the current date on new orders. You may change it if appropriate. This date will determine in which month this order will be posted to Sales History and to Commission if you pay commission based on the order.

The **Current Status** of the order is displayed next to the order date. You cannot change this status here but it is displayed for informational purposes. The most common status codes you will see are:

- **Open** - A generic open order status
- **Cancelled** - The order has been cancelled
- **Complete** - The order is complete. Usually this means it has been billed.
- **Shipped/Vouched** - A/P invoices have been received but the order has not yet been billed.
-

You may also see other open statuses such as "Rush" or "Hold" that are assigned by your site.

BILL TO: - Enter the customer number or an alias to indicate who should be billed for this order.

If you enter a customer number or alias that has an exact match on the customer alias list **AND** there is only one such match, the customer's information will be displayed without any further prompts. However, if you don't get an exact match **OR** if there is more than one customer entry with the same alias, a list will be displayed for you to pick the customer from. One of the most common reasons you will get the list will be if you have additional contacts set up for this customer. You can pick the correct contact from the list.

If you have set up additional contacts for a particular customer and the list **DOESN'T** pop up, click on the **look up** icon () and select the correct contact from the list that will then be displayed. The billing, shipping, contact, FAX and e-mail address from that contact will be selected. Also, you can select data including sales reports in the Create-A-Report area based on contact.

The billing address of the customer or contact you select will be displayed. If you need to change the billing address or other miscellaneous information about the customer, click on the [Update this information](#) link shown below the billing address.

Besides the billing address itself, the following information can be changed through this link:

- Contact name
- Telephone number
- FAX number
- E-mail address
- Salesman number
- Tax routine
- Credit terms

FINAL SHIPPING ADDRESS - Enter the **final** shipping address to which the order should be shipped.

IMPORTANT! Note that this address is the final destination of the order. If you want the merchandise to be shipped to you first so you can deliver it to the end-user or if you want the vendor to ship to a decorator or other vendor instead of directly to the end-user, enter that address by clicking in the "Vendor ships to" address directly below the final shipping address area.

The shipping address from the customer file will be the one displayed initially. If you need to change it click on the [Update this information](#) link below the shipping address.

If the merchandise on the order will be shipped to more than one address, you can enter these through the **Ship to Multiple Addresses** menu option under Order Processing, Miscellaneous order functions, Enter Multiple Shipment Addresses. You do not have access to this function from this order entry format.

VENDOR - Enter the vendor number or an alias. If you get an exact match, the vendor's address will be displayed. If you don't get an exact match on an alias or if there is more than one vendor with the same alias, a list will be displayed for you to pick the vendor from.

If this is a decoration type of order, this should be the vendor from whom you are buying the blank goods.

If you are entering a new order, you will also have a **box** icon () available. If you are entering a "ship from inventory" order, click this icon to set the vendor to 999999. The program will know that if the vendor is 999999, that the order should be set up as a "ship from inventory" order. You **CANNOT** change the type of order through this transaction once the order has been added.

If you need to change the vendor address or other miscellaneous information about the vendor, click on the [Update this information](#) link below the vendor address.

Besides the vendor's address itself, the following vendor information can be changed through this link:

- Telephone number
- FAX number
- E-mail address

VENDOR SHIPS TO - This should be the address where you want the vendor to ship the merchandise on the order. The default is the final shipping address. However, if you want the vendor to ship the merchandise to a decorator, you can enter the decorator's vendor number or alias and the decorator's address will be displayed. Or, if you need to change the address in some other way, you can click on the [Update this information](#) to make these types of changes.

If you are the decorator, you can click on the box icon to set the decorator vendor number to 999999.

If you are not the decorator but you want the order shipped to you, click on the "update" link. There is a link to quickly put your company address in the "vendor should ship to" address.

Besides the decorator's address itself, the following information about the decorator can be changed through this link:

- Telephone number
- FAX number
- E-mail address

Line Items

The next area is where you will enter the information on the individual items ordered. The number of lines included in this area is defined in the system options for Order Processing.

IMPORTANT! When entering quantities and pricing, do not enter commas or dollar signs.

If you have a negative cost or price, you may enter the minus sign in front of the number (-1234.56) or at the end of the number (1234.56-).

You may not enter a negative quantity.

The following pieces of information are requested for each line in the line item table:

LINE - The line number is listed. When you finish entering your order and are ready to record it, some validation is done to make sure there are no errors. Some of the error messages refer to the line number so this number is displayed for your reference.

ITEM NUMBER - You may enter an item number. This can be an item from your inventory item file or the supplier's item number. You may also leave it blank.

If the item number is one on your inventory item file, the related description, cost, and selling price will be entered into their respective fields. You may also use the look up icon to look up an item number.

If you pick an item number from your item file and that item has sizes or colors, a window will pop up so that you can pick that information from the list of valid colors and/or sizes. If you need to change it later, you can click on the **T-shirt** icon () beside the quantity to select the correct combination.

Item/Color/Size

Item Number	Description	Color	Size
B1234	BALLOONS	Blue	
B1234	BALLOONS	Red	
B1234	BALLOONS	White	

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Exit
Next →

If you are on any line past the first line, you can click on the **clipboard** icon () to copy the item number, description, unit cost and unit sell from the previous line.

If you want to delete a line, click on the **trashcan** icon (). If the item is a new item, the data in all the input boxes on that line will be cleared. If the item was added on an earlier session, the background for that line will turn red to indicate that the line will be deleted. If you clicked on the icon by mistake and you had old data, you can click on it again to "undo" your request and leave the item on the order.

Line	Item number	Quantity	Description	Unit Cost	Extended Cost	Unit Price	Extended Price
Items							
1	AS00131 130	130	1" cap sealed ring binder w/horiz pocket front and back w/2" curved sheet lftr #7859 <i>Imprint information for this item</i>	3.87	503.10	5.00	650.00
2							

Once an item has been billed or had A/P costs vouched against it, you cannot delete it. These items will have a different icon, a **trash can with an "X" through it** ().

You may click on the **Catalog** link to select the item and related information from the Lakeshore supplier catalog. Be sure to pick the appropriate price break so that the correct pricing will be inserted into your order. If the item has colors, click on the color link to select the item and color you want to use. If the item is one that does not have colors, you will have a "Select this item" link you can click on to select your item. A sample of the catalog screen is shown below.

Styles for SANMAR

Vendor's Style #	Colors	Sizes	Description	Extended Description	Pricing		
0504	Black Cardinal Deep Forest Deep Navy Deep Red Deep Royal	S,M,L,XL	 Stedman by Hanes Jersey Knit Sport Shirt with Pocket. <i>Swatches Specs Web site</i>	5.5-ounce, 50/50 cotton/poly Welt collar and rib knit cuffs 2-button placket Pearlized buttons Double-needle bottom hem	Qty	Cost	Price
					1	6.05	10.66
					12	5.67	10.66
					36	5.33	10.66
0504	Black Cardinal Deep Forest Deep Navy Deep Red Deep Royal	2XL	 Stedman by Hanes Jersey Knit Sport Shirt with Pocket. <i>Swatches Specs Web site</i>	5.5-ounce, 50/50 cotton/poly Welt collar and rib knit cuffs 2-button placket Pearlized buttons Double-needle bottom hem	Qty	Cost	Price
					1	7.87	10.66
					12	7.35	10.66
					36	6.89	10.66

QUANTITY - Enter the quantity ordered

If the item is not on your item file but it is a garment or other type of item that has sizes, you can click on the T-shirt icon beside the quantity to enter the mix of sizes and the quantities for each. The total of the various sizes will be computed and placed in the quantity field on the main order form. The information on the size breakdown will also be added to the

description when you update the order.

Size breakdown

Type of sizes:

Size breakdown:

Total quantity

In the example above, the total quantity of 45 would be the one used for that line item. The way the description will be formatted for the item in the catalog and size screens shown above is as follows:

```
Stedman by Hanes Jersey Knit
Sport Shirt with Pocket.
Color: Deep Navy

Adult      5 Small
           10 Medium
           15 Large
           15 X-Large
```

Once you have added the item and exited the order form, if you come back later, you will **NOT** have the T-shirt icon beside the quantity because the size information will already be in the description. If you have to make changes, you should change the quantity ordered and change the size information in the description box.

The following types of sizes are available:

- **Adult** XS through XL
- **Plus** 2X through 6X
- **Ladies** XS through XL
- **Youth** XS through XL
- **Specify** You may enter up to 6 size codes.
Examples of when you might need this option: Infants, Dress shirts, Pants
- **No size** Single quantity. No size information inserted into description. This is the default.

DESCRIPTION - Enter the description of the item. You have a maximum of 10 lines with 30 characters on each line. If you are inserting size information as noted above, the number of lines you have available will be reduced by the number of sizes you use that have a non-zero quantity. For example, in the example above, quantities were entered for 4 sizes. You would have $10 - 4 = 6$ lines available for the rest of your description. You will be warned if you try to enter too many lines.

The area where you enter the description is small so if you would like to have a larger area displayed so you can see more of the description you are entering at one time, click on the **more detail** icon () beside the description.

Note that a "decorate and ship" normally has one description for the blank goods and one for the decorated item. If you are entering the order using this function, the same description will be used for both. This is normally not a problem but you should be aware of the difference.

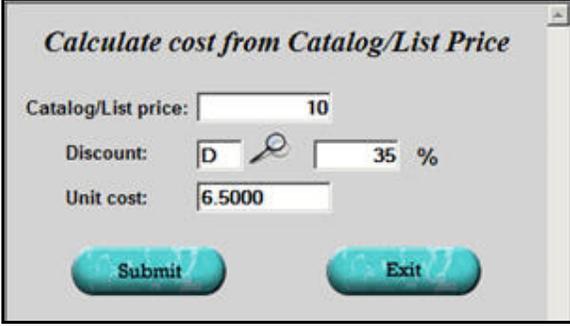
If you want to enter specific imprint information for this line item, click on the ***Imprint information for this item*** link. You can enter up to 20 lines of imprint information that apply **ONLY** to this line item. There is also a general imprint information area that applies to the whole order at the bottom of the entry screen.

UNIT COST - Enter your cost for each item. The maximum unit cost is 9999.9999.

The small box below the cost is for a pricing unit such as "C" if the cost is "per hundred" or "M" if the cost is "per

thousand". You may leave it blank if the price is for a single unit.

If your cost is based on a discount off a catalog or list price, you may click on the **book** icon () to get a screen where you can enter this information and have the unit cost calculated for you.



Calculate cost from Catalog/List Price

Catalog/List price:

Discount: %

Unit cost:

If you are updating a "decorate and ship" type of order, you will also be prompted for the unit cost to decorate the item.

EXTENDED COST - The quantity ordered will be multiplied by the unit cost and adjusted by any pricing factor such as "per hundred" to calculate the extended cost. Normally you will not need to change this amount.

If you have a line with a unit cost of \$10,000 or more, leave the unit cost blank and enter the total amount in the extended cost field.

If the extended cost is zero, you may indicate how you want the item to appear on the purchase order. You have the following choices:

- **.00** - The cost will be printed as ".00". This is the default.
- **N/C** - The literal "N/C" will be printed instead of a cost amount.
- **Leave cost blank** - Nothing will be printed in the cost area. This may be appropriate if you do not know the exact cost amount.
- **Do not print** - This line will not be included on the purchase order to the vendor. This might be appropriate if this line applies only to the customer.

If the cost is not zero, you will not be prompted for this information.

If you are updating a "decorate and ship" type of order, you will also be prompted for the extended decoration cost. If it is zero, you will also be able to pick the way you want the decoration cost to be printed on the decorator's order.

UNIT PRICE - Enter the unit price you will charge the customer. The maximum unit price is 9999.9999. Any pricing unit you entered under the unit cost will be redisplayed here. You must use the same pricing unit for both the cost and sell.

If you want to calculate your selling price based on a mark up of the cost or to get a certain gross profit percentage, click on the target icon () to get a screen where you can pick from several pre-defined percentages. These percentages and whether the calculations are done as a mark up or for a gross profit percent is set up under the system options for quotations. This is the same method used in the Quotation System.

For example, suppose your unit cost is \$10.00 and you want to calculate a unit price based on target gross profit percentages. You would see the following choices:



Target prices

Gross profit %	Selling price
40%	16.6667
45%	18.1818
50%	20.0000

If you wanted to have about a 45% gross profit, you would click on the [18.1818](#) number and that unit price would be selected into the order. If you wanted to round this off, you could then override the unit price to something like \$18.20.

EXTENDED PRICE - The quantity ordered will be multiplied by the unit price and adjusted by any pricing factor such as "per hundred" to calculate the extended price. Normally you will not need to change this amount.

If you have a line with a unit price of \$10,000 or more, leave the unit price blank and enter the total amount in the extended price field.

If the extended price is zero, you may indicate how you want the item to appear on the acknowledgment to the customer.

You have the following choices:

- **.00** - The price will be printed as ".00". This is the default.
- **N/C** - The literal "N/C" will be printed instead of a price amount.
- **Leave price blank** - Nothing will be printed in the price area.
- **Do not print** - This line will not be included on the acknowledgment. This might be appropriate if this line applies only to the purchase order and you don't want the customer to see it.

If the price is not zero, you will not be prompted for this information.

You may occasionally need more lines than are initially displayed. Click on the [Add additional line](#) link to add a new line item to the table.

Additional charges

If you use the separate "additional charge" feature, a place is provided to add these charges also. These are charges that do not have a quantity associated with them and can be excluded from commission and discount calculations. If you do not use this feature at your site, you will not see this area included on your display.

Initially, 3 charge lines will be displayed. If you need additional lines than is displayed on the original screen, click on the [Add another additional charge line](#) link to add a new line to this area.

Totals

The total cost and selling price for the merchandise and charges will be calculated and displayed for you.

If you want to get an estimated total for the order and want to include shipping charges or if you want to bill a specific amount for shipping, you may enter that amount.

The estimated sales tax based on the selling price and shipping charges (if your state charges tax on freight) will be calculated and displayed. The tax percentage is also displayed. If the percentage is wrong, go back up to the "Bill to" area and click on the update link to change the tax routine so that you have the correct percentage.

The total estimated amount for the merchandise, charges, shipping and sales tax will be calculated and displayed.

The credit terms to be used for the order will be displayed. If this is not correct, go back up to the "Bill to" area and click on the update link to change the credit terms code to the correct one.

If the order is to be charged to a credit card, click on the [Credit card](#) link to enter the credit card number and associated information.

There is a place to enter the amount of any deposit you make to the vendor. The deposit amount can be printed on the purchase order or can be used for your reference but is not used in any other way.

There is also a spot to enter the amount of a deposit that you have received from the customer for the order. It will be transferred to the invoice when the order is billed so you can show the customer how much remains to be paid on the order. The deposit should also be entered into the Accounts Receivable system.

Comments/Instructions/Imprint

There are four types of comment-type fields that you may use. Your site may use some or all of these. Any that you use will be displayed on the screen. The four types are:

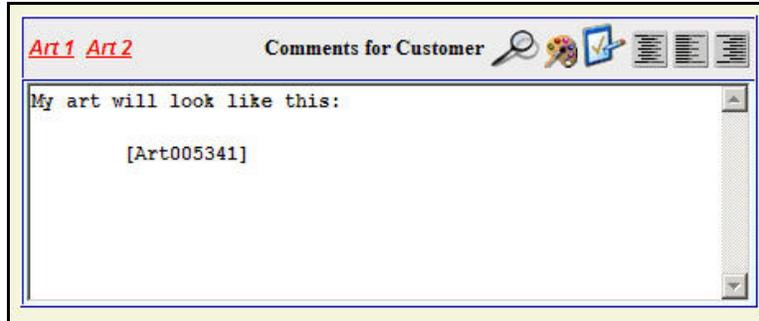
- Comments
- Imprint
- Special instructions
- Vendor instructions

There are several links and icons related to each set of comments. In the discussion below, the term "comments" will be used but the same functionalities described are available for all type of comments and instructions.

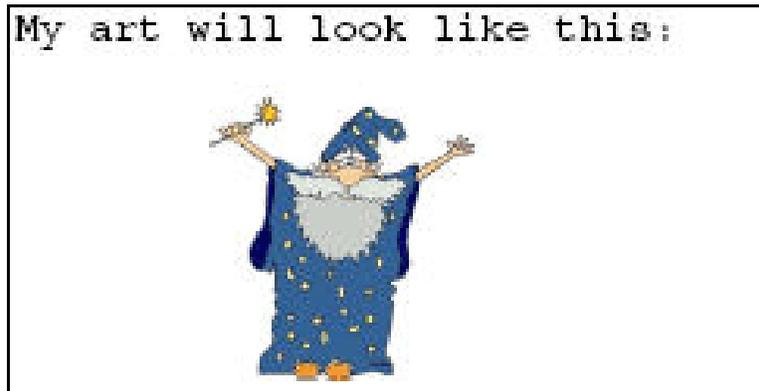
If you have entered art numbers in the general information area above, you will see a link to the left of the box title that says [Art 1](#), etc. Click on one of these links to have a thumbnail of the related art included in your comments.

You can also click on the **palette** icon () to look up any art number you have on your art file and insert it into the comment area.

Regardless of the method you use to select the art number, it will look like this once the art number is inserted into the comments area on your screen:



It will look like this when you print it:

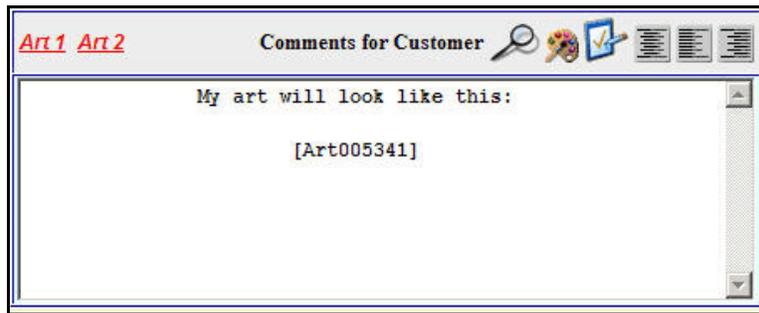


If you have comments or instructions you use frequently, you can set these up as standard comments and easily pull them into your comment area as you did the art information. The standard comments are set up by going to Reference Information, Miscellaneous codes group 1, Standard comments. To select the comments, click on the area in the comment box where you want the comment inserted, then click on the look up icon next to the comment area title and pick the comment from the list.

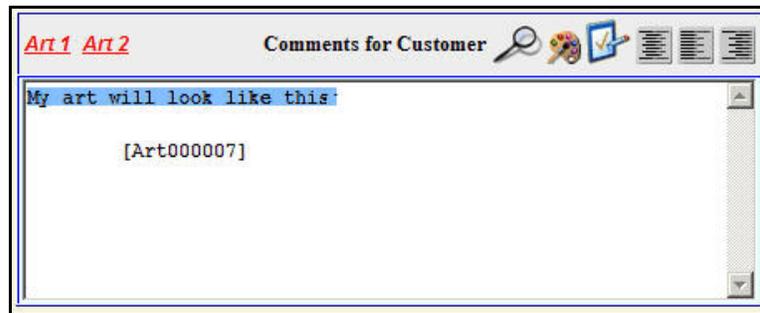
You can check the spelling of the text in the comment area by clicking on the **spelling** icon ()

You can center or align some or all of the text by clicking on one of the **alignment** icons ( to center,  to left justify, or  to right justify). If you want to only align part of the text, use your mouse to highlight the part you want to align, then click on the icon. If you want to align ALL of the text in the box, just click on the icon without highlighting anything.

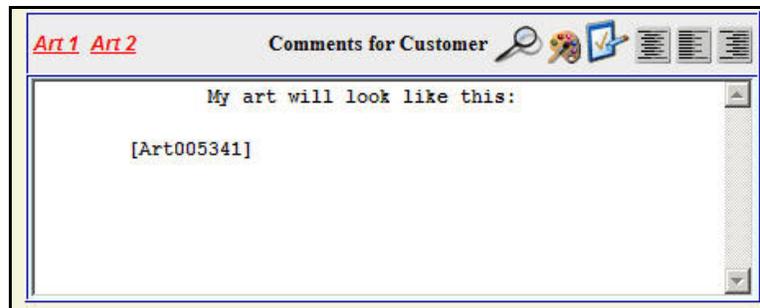
It will look like this if you clicked on the "center" icon without highlighting any text:



To highlight an area, hold down your mouse key on the first character and then drag it to cover the area you want to highlight without letting up on the key. When the area is highlighted, then release the key. It will look something like this:



Then click on the justification button. For example, it will look like this if you clicked on the "center" icon after highlighting the first line:

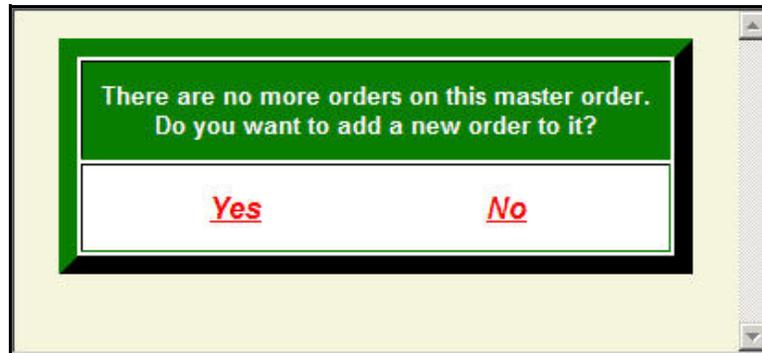


In addition to the four types of comments described above, you may also have repeat instructions if you are entering a repeat order. The repeat instructions are usually generated automatically but you may want to review, change, or add to them. You can access these instructions by clicking on the [***Repeat instructions***](#) link.

Saving your Order

When you finished entering your information, click on either the left or right arrow or the "Done" button to save your work. If you decide you do **NOT** want to save your changes, click on the "Exit" button.

If you click on the right arrow box to go to the next order in the master order and there are none, you will get a box like this:



Click on the Yes option to add a new order to this master order. Click on the No option if you do **NOT** want to add another order to this master overview. You will be returned to the master order overview.