Manager Reference: Order

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.1 Introduction

.1.1 Discussion

The Order Manager opens by default to the Order List tab so that you can quickly find existing orders by Status and Type. From that opening screen, you can select a particular Order with which to work, or choose another tab, such as Quotes to begin your effort.<P> See the <I>Sales Order Process</I> section of <B>Application Overview For Users</B> for a more extensive discussion of the Sales Order procedures.

.1.2 FirstScreen

id:[14057] image:

This screen, probably much more full of orders!, will greet you. Use the parameter boxes to reduce the size.

.1.3 First screen presented

By default, the first screen shown when opening the Order Manager is the Order List screen, under the assumption that most anticipated work will begin with selecting an existing order to work from. We show you that screen here, but the discussion in this document will follow the tabs from left to right. Therefore, to see more about the Order List screens, please select that section, below.

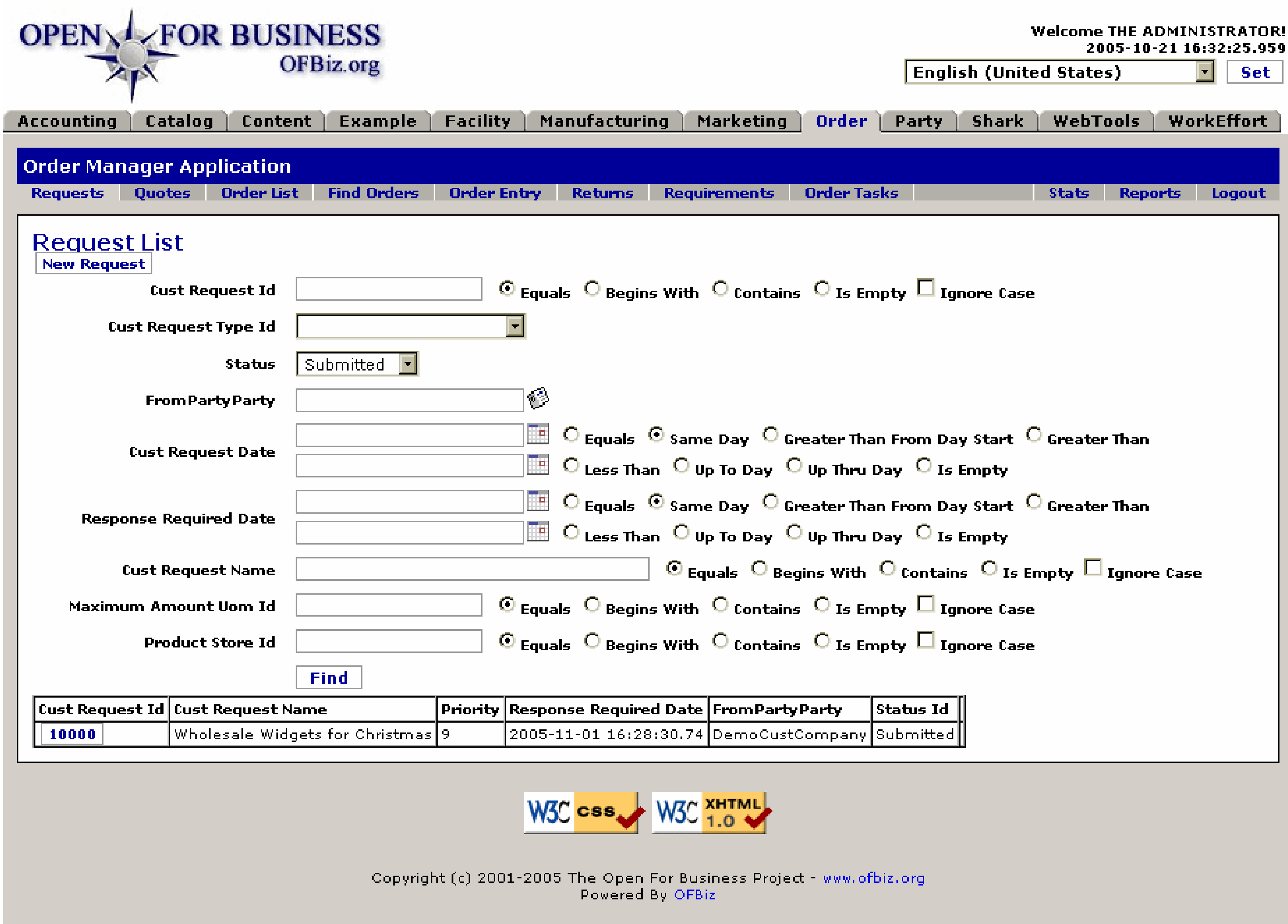
.2 Requests

.2.1 Introduction

<B>Requests</B> is the place to handle the documentation of RFQs (Requests for Quotation) and other items needing a response. Documenting the request when it arrives will assure a record of the request associated with a record of the response.

.2.2 FindRequests

id:[12581] image:



First screen under the Requests tab is a table of current requests with a search tool. Click on the Cust Request ID to view or edit.

.2.3 link buttons

[New Request] [Find]

.2.4 Search tool

.2.4.1 Cust Request ID

Select a radio button for: Equals / Begins With / Contains / Is Empty; check box to Ignore Case.

.2.4.2 Cust Request Type ID (drop-down box)

Request Types could include one of the following: <P><B> Request For Bug Fix
 Request For Catalog
 Request For Feature
 Request For Information
 Request For Proposal
 Request For Quote
 Request For Support</B>

.2.4.3 Status (drop-down box)

Status types could include one of the following: <P><B> Submitted
 Accepted
 Reviewed
 Completed
 Rejected
 Canceled</B>

.2.4.4 From Party (popup search tool)

Enter the ID of the Party asking the Request or use the search tool to identify the Party ID.

.2.4.5 Cust Request Dates

Enter one of two dates with a qualifying radio button for: Equals / Same Day / Greater Than From Day Start / Greater Than // OR Less Than / Up To Day / Up Thru Day / Is Empty.

.2.4.6 Response Required Date

Enter one of two dates with a qualifying radio button for: Equals / Same Day / Greater Than From Day Start / Greater Than // OR Less Than / Up To Day / Up Thru Day / Is Empty.

.2.4.7 Cust Request Name

Select a radio button for: Equals / Begins With / Contains / Is Empty; check box to Ignore Case.

.2.4.8 Max Amount Uom ID

Search on the UOM for the request by Currency.

.2.4.9 Product Store (drop-down box)

Select the Product Store from the drop-down box.

.2.5 Table of requests

.2.5.1 Cust Request ID

This is the number generated by the system which identifies the Customer Request throughout its life.

.2.5.2 Cust Request Name

As a number is difficult to remember, the name you give the Customer Request will identify the Request for you.

.2.5.3 Priority

What level of importance do YOU attach to this Request? Some will naturally be more time critical or more business essential than others. Use the Priority system to keep these relative matters in perspective.

.2.5.4 Response Required Date

Most Requests will be accompanied with a date by which the information MUST be provided. Often times, the Request has little value if not submitted by this date.

.2.5.5 FromPartyParty

The requesting Party: the one expecting a response to the Request.

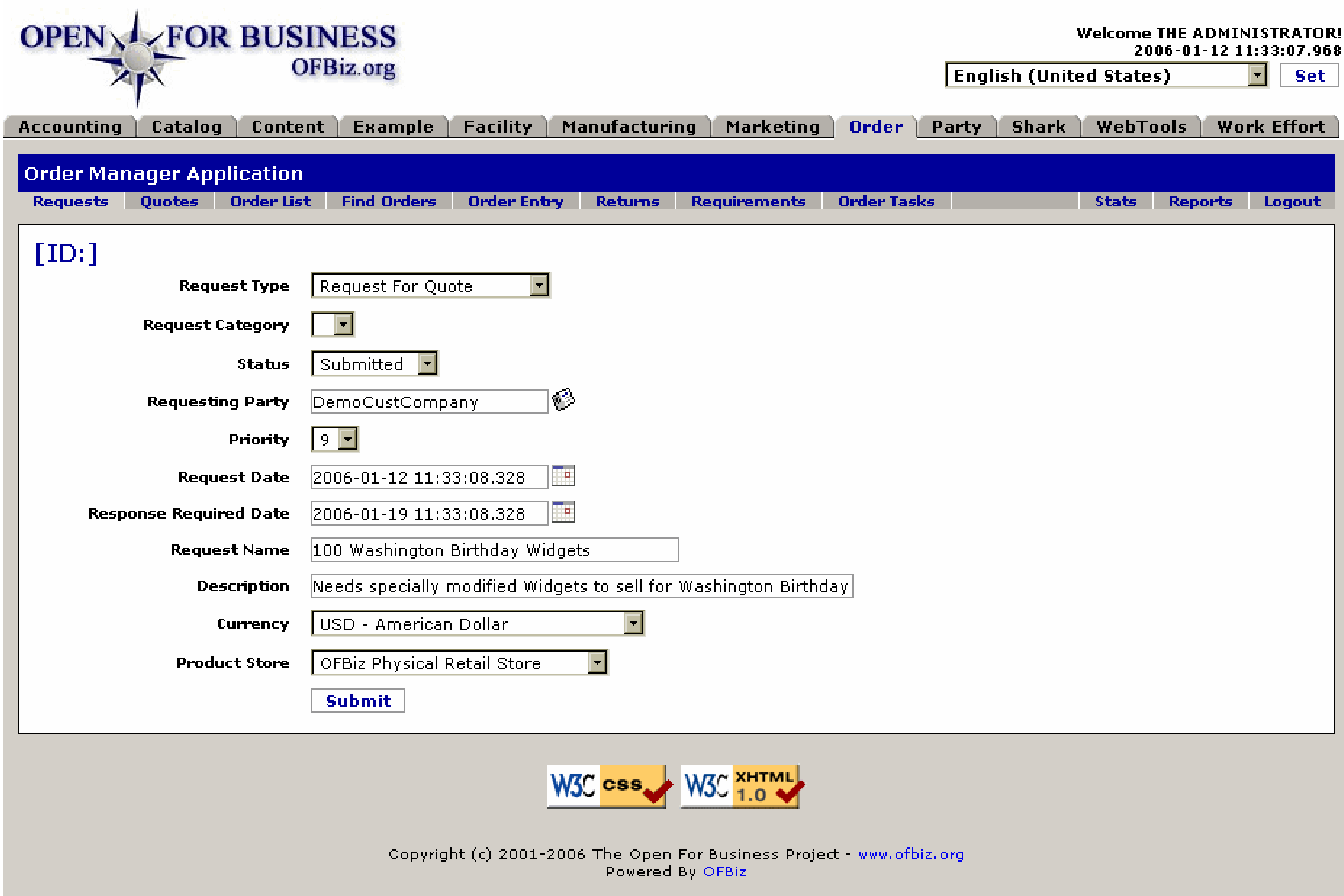
.2.5.6 Status ID

Where is this Request in its progress through the system? Has it just been entered? Has it been fulfilled? The Status needs to reflect what is happening with the Request itself.

.2.6 Create a new request

.2.6.1 request-new

id:[12594] image:



When entering information from a new Request, be as complete as possible; additional data can be added from the Edit screen.

.2.6.2 link buttons

[Submit]

.2.6.3 Request Type (drop-down box)

Request Types could include one of the following: <P><B> Request For Bug Fix
 Request For Catalog
 Request For Feature
 Request For Information
 Request For Proposal
 Request For Quote
 Request For Support</B>

.2.6.4 Request Category (drop-down box)

For future use with Categories of Requests.

.2.6.5 Status (drop-down box)

Status types could include one of the following: <P><B> Submitted
 Accepted
 Reviewed
 Completed
 Rejected
 Canceled</B>

.2.6.6 Requesting Party (popup search box)

Since the entry is to be made from the search tool which only calls up existing parties, if this is from a party not previously corresponding with your company, you will first need to Create the Party in the Party Manager.

.2.6.7 Priority (drop-down box)

You may assign a numbered Priority of 1 to 9.

.2.6.8 Request Date (popup calendar)

The date the Request was made by the Requester.<P> NOTE: This does NOT automatically populate when entered into the system. This may be the date the original requestor placed on his Request, so you would want to enter that date. When he calls to enquire, he might ask about his 'Request of May 14th,' for example.

.2.6.9 Response Required Date (popup calendar)

This is the date by which the requestor expects to hear back from you with his information.

.2.6.10 Request Name

This is the name associated with the Request, not the name of the requestor. For example, if this is a Request for Proposal, the name might be something like:
<I> RFP to Build 10 Chess-playing Widgets</I>

.2.6.11 Description

Enter enough detail so that others could understand the nature of the Request. Exact details will be entered from an editing screen.

.2.6.12 Common Currency (drop-down box)

The national currency under which prices are quoted.

.2.6.13 Product Store (drop-down box)

The Product Store which needs to respond to the Request. Select from the drop-down box.

.2.7 Edit existing requests

.2.7.1 View Request tab

.2.7.1.1 ViewRequest

Presents the Request information in a professional layout, suitabble for printing or analysis. Work in progress.

.2.7.1.2 link buttons

New Request] [New Quote]<B> [View Request] [Request] [Request Roles] [Request Items]</B>

.2.7.1.3 Request ... Information

The basic details about the Request. See the Request tab descriptions for more information about the fields.

.2.7.1.4 Dates

Important dates associated with the Request. See the Request tab for more information about these fields.

.2.7.1.5 Request Items

What Product or service is being requested, with amounts and costs.

.2.7.2 Request tab

.2.7.2.1 EditRequest

id:[12618] image:

Edit an existing Request, starting with this screen. Move on to the other sub-tabs as part of the development process.

.2.7.2.2 link buttons

[Submit] <B>[View Request] [Request] [Request Roles] [Request Items]</B>

.2.7.2.3 Request Type (drop-down box)

Request Types could include one of the following: <P><B> Request For Bug Fix
 Request For Catalog
 Request For Feature
 Request For Information
 Request For Proposal
 Request For Quote
 Request For Support</B>

.2.7.2.4 Request Category (drop-down box)

For future use.

.2.7.2.5 Status (drop-down box)

Status types could include one of the following: <P><B> Submitted
 Accepted
 Reviewed
 Completed
 Rejected
 Canceled</B>

.2.7.2.6 Priority (drop-down box)

When time is running short, the priority has to increase. Assigning a meaningful Priority helps management make informed decisions.Select from priorities 1 - 9, 1 being highest.

.2.7.2.7 Request Date (popup calendar)

Date of the original Request from the requester.

.2.7.2.8 Response Required Date (popup calendar)

When the Requester expects to receive a response.

.2.7.2.9 Request Name

The name by which the Request is called.

.2.7.2.10 Description

What is wanted by the Requester.

.2.7.2.11 Currency (drop-down box)

What national currency will form the basis of the response?

.2.7.2.12 Product Store (drop-down box)

Which Store needs to reply to this Request.

.2.7.3 Request Roles tab

.2.7.3.1 requestroles

id:[12629] image:

Roles for each Party involved in the Request can be identified, added or removed at this screen.

.2.7.3.2 link buttons

[Delete] [Submit] <B>[View Request] [Request] [Request Roles] [Request Items] </B>

.2.7.3.3 Table of parties and roles

.2.7.3.3.1 Party ID

Click on the Party ID and you are taken to the Profile screen for this Party on the Party Manager.

.2.7.3.3.2 Role Type

The Role Type for this Party in this Request process.

.2.7.3.3.3 Name

The Name of the Party as specified for the selected Party ID.

.2.7.3.3.4 Remove

Click on the [Delete] link to remove the Party with its Role from this Request.

.2.7.3.4 Tool to associate Party ID and Role

.2.7.3.4.1 Party ID (popup search tool)

Find the Party from the popup tool or accurately enter the ID if known.

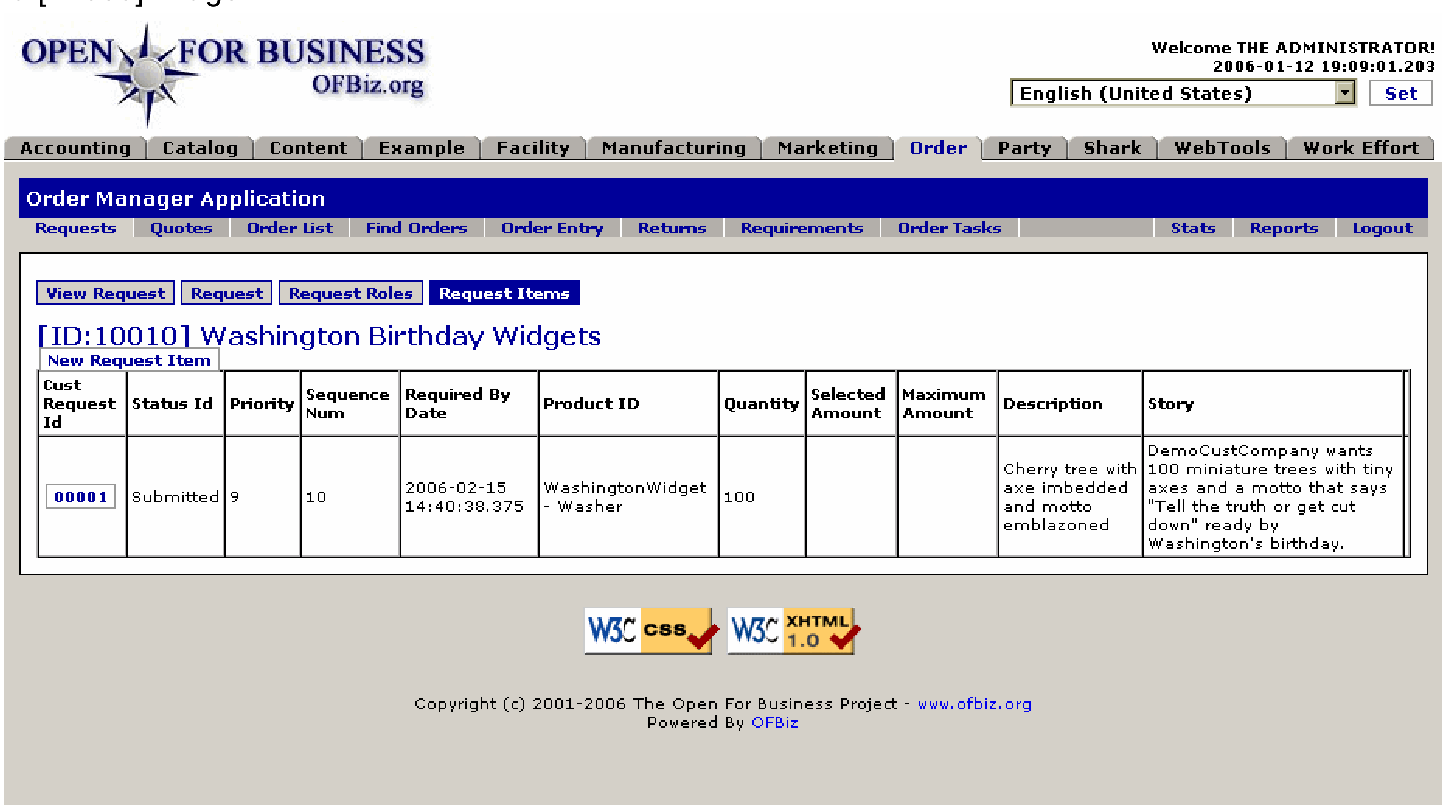
.2.7.3.4.2 Role Type (drop-down box)

Role Type could include one of the following: <P><B> WorkEffortRequestingParty
 Order Agent
 Request Taker
 Request Manager</B>

.2.7.4 Request Items tab

.2.7.4.1 requestitems

id:[12639] image:



Click on the Cust Request ID number to edit the Request Item.

.2.7.4.2 link buttons

[New Request Item] <B>[View Request] [Request] [Request Roles] [Request Items] </B>

.2.7.4.3 Cust Request ID

When the Cust Request ID is clicked, you are taken to the OrderItems tab with more options for editing the Request. This path is also followed when processing Quotes.

.2.7.4.4 Status ID

Where is this Request in its progress through the system? Has it just been entered? Has it been fulfilled? The Status reflects what is happening with the Request itself.

.2.7.4.5 Priority

The Priority established for this Request to compare it with other Requests.

.2.7.4.6 Sequence Num

If a sequencing system is in place, this is the assigned sequence number.

.2.7.4.7 Required By Date

When the response to the Request is required.

.2.7.4.8 Product ID

Actually both the Product ID and its Name.

.2.7.4.9 Quantity

How many units of the requested Product are sought.

.2.7.4.10 Selected Amount

Price of the Product selected.

.2.7.4.11 Maximum Amount

Quantity times the Selected Amount.

.2.7.4.12 Description

Information about the product or service.

.2.7.4.13 Story

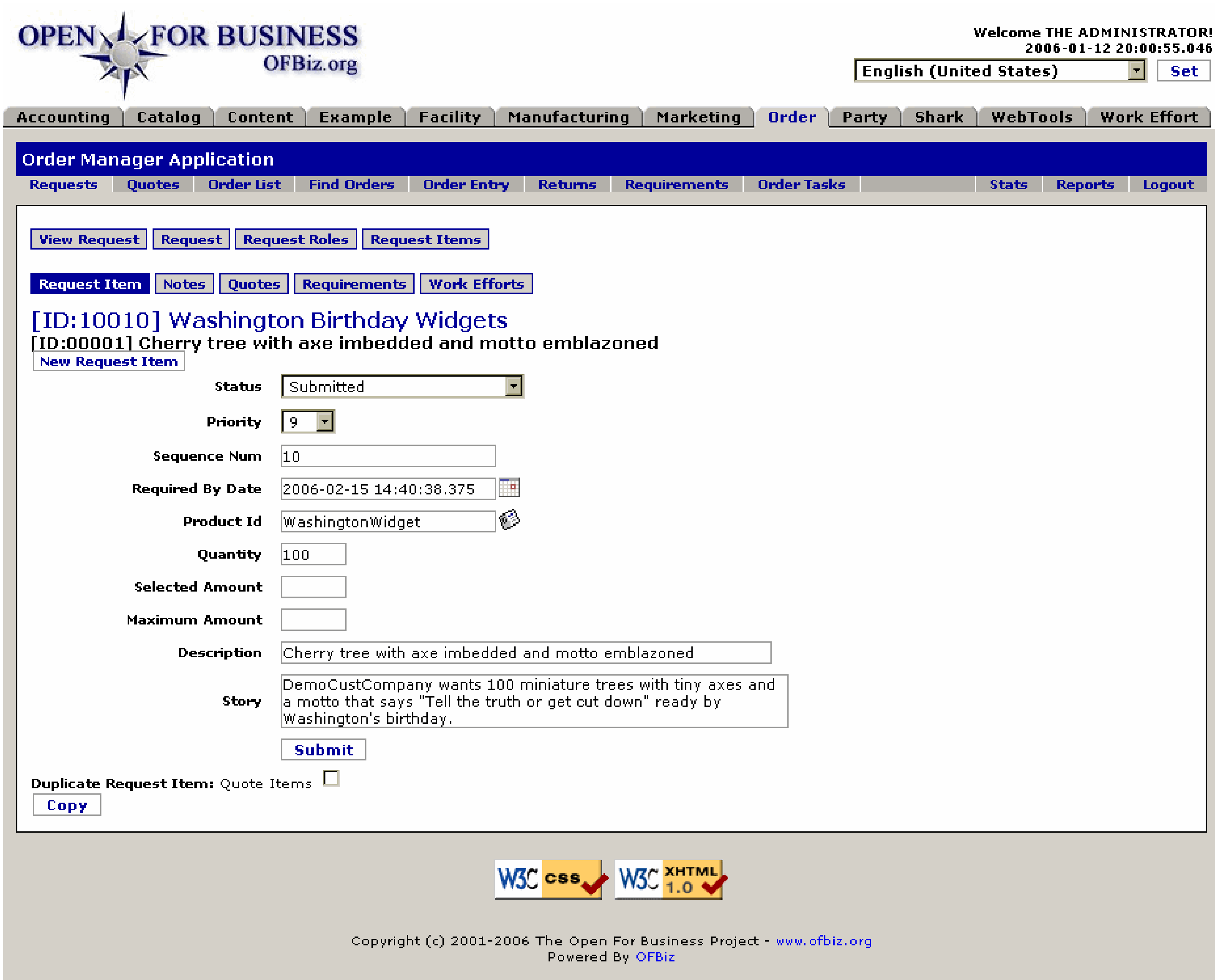
Why this Request has been made of your company or department.

.2.7.5 Request Item tab

.2.7.5.1 Request Item tab

This and the remaining tabs do not appear until a Request Item's 'Cust Request Id' is selected and clicked upon under the Request Items tab.

.2.7.5.2 Request-OrderItem



Similar to the screen for creating a new Request Item, this screen opens access to additional sub-tabs.

.2.7.5.3 link buttons

[New Request Item] [Submit] [Copy] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts] </B>

.2.7.5.4 Status (drop-down box)

Possible Status could be: <B><P> Submitted
 Accepted
 Rejected
 Canceled

 Review Request (Reviewed)
 Cancel Request (Canceled)</B><P> NOTE: Status choices may be different after it has been Accepted.

.2.7.5.5 Priority (drop-down box)

The Priority established for this Request to compare it with other Requests. Select 1 - 9 from the drop-down box.

.2.7.5.6 Sequence Num

If there is a sequencing system in place, this is where the Sequence Number is added.

.2.7.5.7 Required By Date (popup calendar)

When the Response to the Request is required by the requestor.

.2.7.5.8 Product ID (popup search box)

Only one Product ID can be found in a Quote Item. Narrow this one down to the clearly defined Product requested by this item within the request. Either enter the Product ID or use the popup search tool.

.2.7.5.9 Quantity

How many are being considered by this request.

.2.7.5.10 Selected Amount

The cost for the selected item.

.2.7.5.11 Maximum Amount

This could be the Maximum price the customer is willing to pay, or it could be the maximum units acceptable to get a price break. In the latter case, for example, he might be asking for 20, but he could get an excellent price break at 24.

.2.7.5.12 Description

Additional details about this item. Description is an opportunity to confirm in words that the Product ID matches what the customer wants. If the Product ID is GZ-1000 but the Description says Square Gizmo, then there is a problem; GZ-1000 is for the Tiny Gizmo.

.2.7.5.13 Story

What is being sought in this Request. Here the customer's 'story' is summarized. Include whatever details can help you keep the customer happy. If the Salesman promised extra features for the same price, explain that here.

.2.7.5.14 Duplicate Request Item

Check the box to copy this item over to the Quotes.

.2.7.6 Notes tab

.2.7.6.1 requestitemnotes

Notes for just this Item Seq ID or select [Show All Notes] displayed in the table. Add another Note in the box with [Submit].

.2.7.6.2 link buttons

[Show All Notes / Show This Item's Notes] [Submit] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts] </B>

.2.7.6.3 Table of existing Notes

.2.7.6.3.1 Cust Request Item Seq ID

Identifies the specific Item to which the Note is directed.

.2.7.6.3.2 Note Info

Within handling limits, the entire text of the Note will appear in this box.

.2.7.6.3.3 Note Date Time

When the Note was posted.

.2.7.6.3.4 Party ID

The identity of the Party that posted the Note.

.2.7.6.3.5 Name

The Name of the Party that posted the Note.

.2.7.6.4 Tool to add a Note

Enter text in the box and press Submit. The Note will be posted against the selected Cust Request Item Seq Id and carry the identity of the Party that presses the Submit button.

.2.7.7 Quotes tab

.2.7.7.1 RequestItemQuotes

id:[12660] image:

Established Quotes associated with this Request are shown here.

.2.7.7.2 link buttons

[OrderNewQuoteItemForQuote] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]</B>

.2.7.7.3 Quote ID

This new Quotation gets its own identity with this Quote ID.

.2.7.7.4 Product ID

Which Product is being Quoted.

.2.7.7.5 Work Effort ID

The ID of the Work Effort event.

.2.7.7.6 Quantity

How many.

.2.7.7.7 Selected Amount

The standing price or amount for the selected product.

.2.7.7.8 Quote Unit Price

The special price established for this Quotation.

.2.7.7.9 Estimated Delivery Date

When this Product should be delivered.

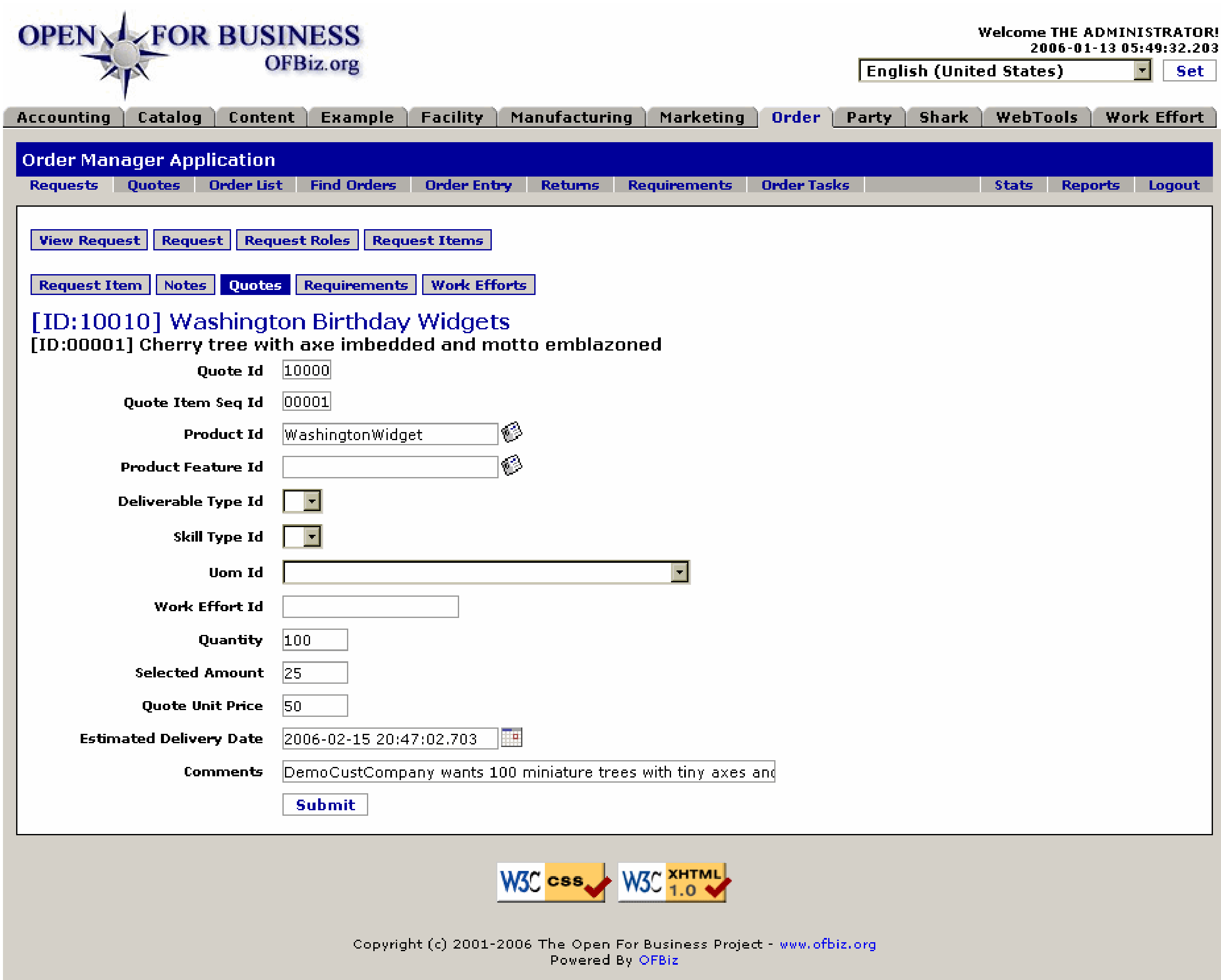
.2.7.7.10 Is Promo

Yes or No: is this a Promotional item.

.2.7.7.11 OrderNewQuote ItemFor Quote

.2.7.7.11.1 EditQuoteItemForRequest

id:[12688] image:



When you have selected a Request Item then come to this screen, some data is populated. Complete the rest as needed.

.2.7.7.11.2 link buttons

[Submit] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes]

[Requirements] [WorkEfforts]</B>

.2.7.7.11.3 Quote ID

The system assigns this number.

.2.7.7.11.4 Quote Item Seq ID

The Item from the original Request that is being quoted for.

.2.7.7.11.5 Product ID (popup search tool)

The Product being quoted for this Item Seq ID.

.2.7.7.11.6 Product Feature ID (popup search box)

Select the Features of a Virtual or assembled Item to be included.

.2.7.7.11.7 Deliverable Type ID (drop-down box)

If there is a deliverable Type, select from the drop-down box.

.2.7.7.11.8 Skill Type ID (drop-down box)

If there is a skill type, select from the drop-down box.

.2.7.7.11.9 UOM ID (drop-down box)

The national currency upon which the quote is based.

.2.7.7.11.10 Work Effort ID

The ID of the Work Effort event.

.2.7.7.11.11 Quantity

How many of the Product are being quoted for.

.2.7.7.11.12 Selected Amount

How much the Selected items regularly sell for.

.2.7.7.11.13 Quote Unit Price

The derived price determined for this quotation, based upon the volume and other factors.

.2.7.7.11.14 Estimated Delivery Date (popup calendar)

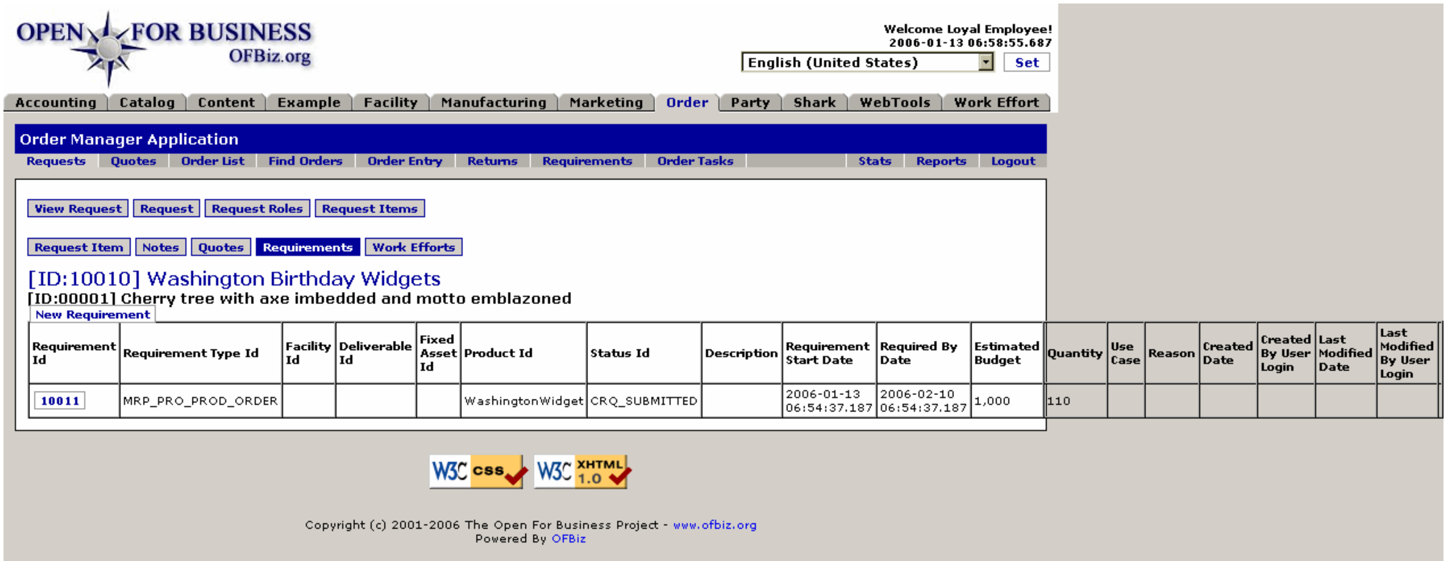
When the Product can reasonably delivered to match both the customer's needs and your capabilities.

.2.7.7.11.15 Comments

Other information pertinent to the Quotation.

.2.7.8 Requirements tab

.2.7.8.1 requestitemrequirements



Requirements are needed to initiate work in the production side of the company. Created under the major Requirements tab, they are displayed here in table form.

.2.7.8.2 link buttons

[New Requirement] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts] </B>

.2.7.8.3 Requirement ID

The system-generated number assigned to this Requirement. Click on this number to edit the Requirement under the major Requirements tab.

.2.7.8.4 Requirement Type ID

What generated this Requirement? Initially selected from a drop-down list under the Requirements tab.

.2.7.8.5 Facility ID

Which Facility will be performing the work under this Requirement?

.2.7.8.6 Deliverable ID

If there is a Deliverable involved, this identies it.

.2.7.8.7 Fixed Asset ID

If a Fixed Asset is to be used in the fulfillment of this Requirement, it is identified here.

.2.7.8.8 Product ID

The ID of the Product being quoted which forms the basis for this Requirement.

.2.7.8.9 Status ID

The Status of this Requirement as it moves from submission through completion.

.2.7.8.10 Description

What needs to be done to accomplish this Requirement?

.2.7.8.11 Requirement Start Date

When effort under this Requirement needs to begin.

.2.7.8.12 Required By Date

When the effort under this Requirement needs to be completed.

.2.7.8.13 Estimated Budget

How much money is available to accomplish this Requirement.

.2.7.8.14 Quantity

How many units need to be completed.

.2.7.8.15 Use Case

If needed, the Use Case will be shown here.

.2.7.8.16 Reason

Why this Requirement was instituted.

.2.7.8.17 Created Date

Date the Requirement was created.

.2.7.8.18 Created By User Login

User Login of the Party that created the Requirement.

.2.7.8.19 Last Modified Date

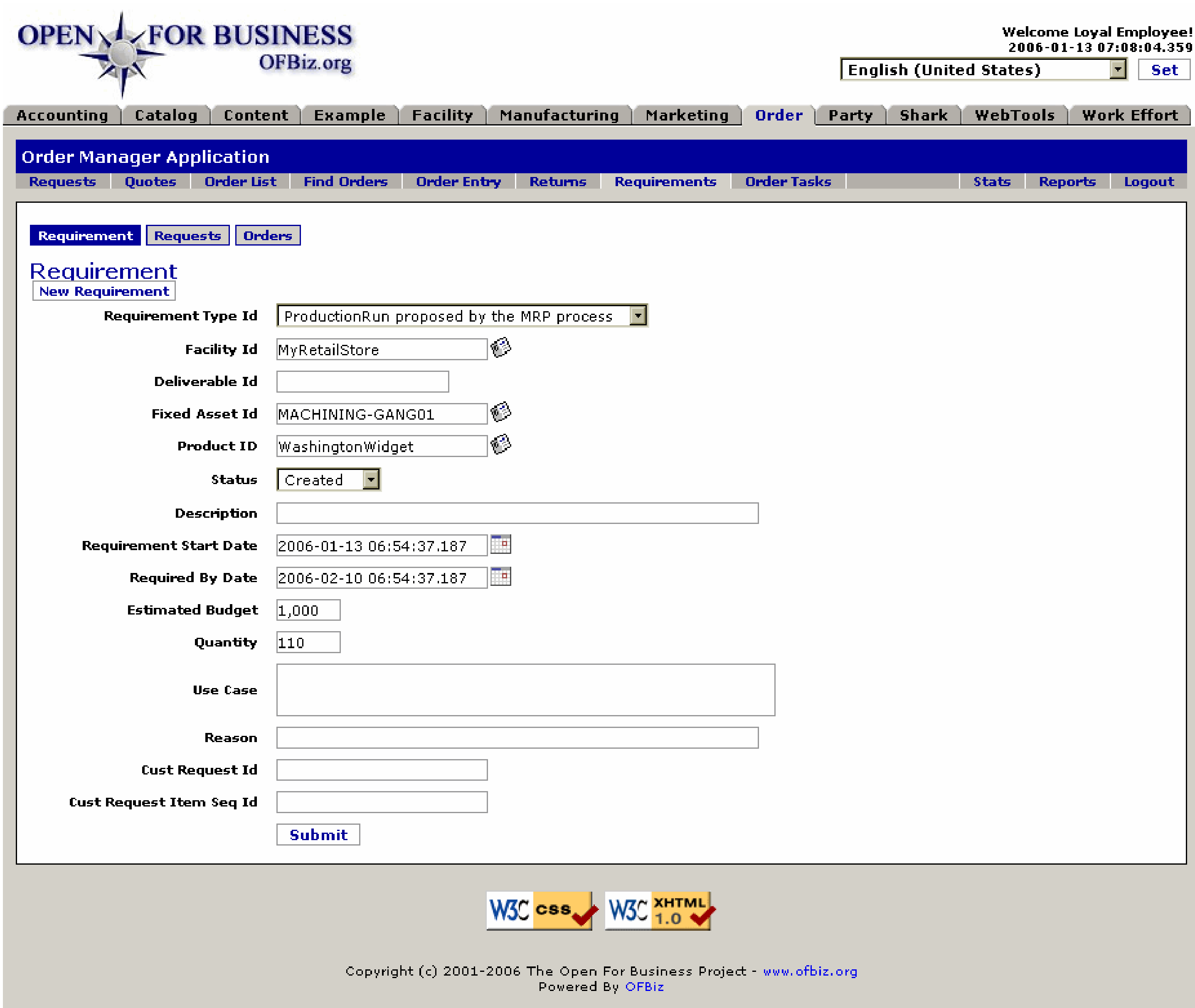
Date the Requirement was last modified.

.2.7.8.20 Last Modified By User Login

Who last modified the Requirement, by User Login.

.2.7.8.21 Edit or Create New Requirement

.2.7.8.21.1 EditRequirement



Requirements are both created and edited at this screen which is actually under the major Requirements tab of Order Mgr.

.2.7.8.21.2 Discussion

See the major tab Requirements for a discussion of this screen. The contents of the table above derive from input at this screen. To come to this screen from the table, either click on the Requirement ID number or select [New Requirement].

.2.7.9 Work Efforts tab

.2.7.9.1 EditRequestItemWorkEffort

Work Effort items are created under the Work Effort manager. Use the search tool to add to this Request Item.

.2.7.9.2 link buttons

[New Request Item] [Add] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts] </B>

.2.7.9.3 Table of Work Effort IDs

Only the Work Effort IDs are listed in the table. Click on the ID to view or edit; click on [Delete] to remove. Use the tool below to bring in more Work Effort items.

.2.7.9.4 Tool to add Work Effort ID

Either enter the ID or use the popup search tool to locate appropriate Work Effort IDs to use with this Request Item.

.3 Quotes

.3.1 Order Quote

Order Quote is a place to prepare and document quotations to prospective purchasers or contractors.

.3.2 FindQuote

id:[11173] image:

First screen under the Quotes tab presents a search tool with a table of found Quotes. Click on the ID number to edit.

.3.3 link buttons

[Create New Quote] [Find]

.3.4 Search for existing quotes

.3.4.1 Quote ID

Radio buttons for: Equals / Begins With / Contains / Is Empty. Check the box if the search is to disregard the UPPER or lower Case of the letters.<P> Enter as much of the Quote ID that can be recalled, then select the radio button which best describes the data you entered. For example, if you enter the number 1 and click the Begins With button, the search will return all Quotes that start with the digit '1'.

.3.4.2 Quote Type ID (drop-down box)

Choices include Other, Product, and Proposal. Addition choices could be programmed in.<P> This describes which category of quotation is sought.

.3.4.3 Party ID

Popup search box for locating the assigned ID of the Party to whom the quotation was directed. This assumes that the Party was identified within your system.

.3.4.4 Quote Issue Date

Popup calendars and Radio Button search descriptors help you narrow down the date when the quotation was issued.

.3.4.5 Status (drop-down box)

Status could be: <B><P> Created
 Approved
 Ordered
 Rejected</B>

.3.4.6 Common Currency (drop-down box)

Select the type of currency: USD (for American dollars), Dinars, Reals, etc.

.3.4.7 Product Store (drop-down box)

Select from the drop-down box.

.3.4.8 Quote Name

Radio buttons for: Equals / Begins With / Contains / Is Empty. Check the box if the search is to disregard the UPPER or lower Case of the letters.<P> Enter as much of the Quote Name that can be recalled, then select the radio button which best describes the data you entered.

.3.5 Table of current quotes

.3.5.1 Quote ID

Click on the Quote ID to bring up the editing tool with the selected quote ready for updating.

.3.5.2 Quote Type ID

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.3 Party ID

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.4 Quote Issue Date

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.5 Status

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.6 Common Currency

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.7 Product Store ID

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.8 Valid From Date

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.9 Valid Thru Date

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.5.10 Quote Name

This field is discussed below under <B>Quote - (Edit or Create)</B>.

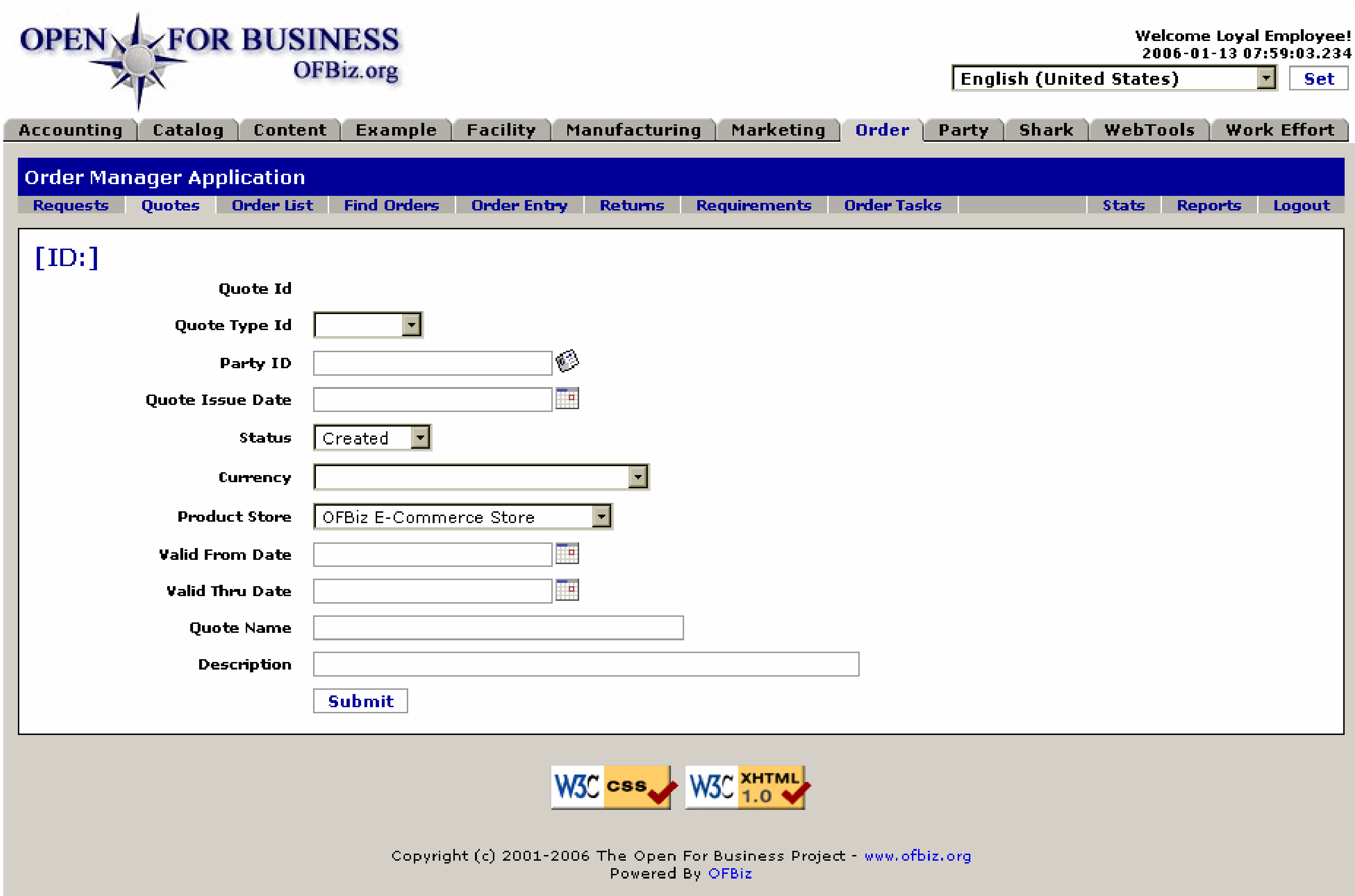
.3.5.11 Description

This field is discussed below under <B>Quote - (Edit or Create)</B>.

.3.6 Create New Quote

.3.6.1 EditQuote-new

id:[11193] image:



Create new Quotes from this screen. You will enter greater detail under the Edit screens.

.3.6.2 link buttons

[Submit]

.3.6.3 Quote ID

This cannot be changed without creating a new quote. The Quote ID is the number which pulls all the details of the quotation together. It will not be created until you [Submit] the new Quote.

.3.6.4 Quote Type ID (drop-down box)

Other, Product, and Proposal are generic types; others could be programmed in.

.3.6.5 Party ID (popup search tool)

Popup search engine provides help locating the ID number for the Party to whom the quotation was directed.

.3.6.6 Quote Issue Date (popup calendar)

This is the date that the Quote is given to the party requesting it, not necessarily the date it was prepared.

.3.6.7 Status (drop-down box)

Status could be: <B><P> Created
 Approved
 Ordered
 Rejected</B>

.3.6.8 Currency (drop-down box)

Choose the currency used as the basis of this quotation from the drop-down box: US Dollars, Lira, Dinars, Reals, etc.

.3.6.9 Product Store (drop-down box)

When your business includes more than one entity, this is where you specify which is offering the Quotation.

.3.6.10 Valid From Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This From Date is the beginning of that period.

.3.6.11 Valid Thru Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This Thru Date is the ending of that period.

.3.6.12 Quote Name

The Quote Name helps to quickly recognize what the Quote is for. <P>You might, for example, name it 'Johnson's June Request for 50 Gizmos.' That would distinguish it from most other Quotes by specifying the recipient (Johnson), the month it was requested (June), the quantity (50) and the product (Gizmos).

.3.6.13 Description

Comments here can help to distinguish later from among many similar quotations. You can also bring in other details requested by the customer so that those preparing the Quotation can better understand what is expected. Likewise, if extra features are to be included above what was requested, have them here so that they can be discussed easily with the customer.

.3.7 View Quote

.3.7.1 ViewQuote

View the selected Quote in this business format. Use the link at the bottom to [Copy] selected parts.

.3.7.2 link buttons

[CommonReport] [SendReportByMail] [Create New Quote] [Create Order] [Copy] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.7.3 Quote ... Information

The primary details of the quotation except for Items and Dates. Will vary according to the type and content of Quotes.

.3.7.4 Quote Items

What is being quoted for, the Quantity, prices, etc.

.3.7.5 Dates

Date of creation and dates of validity are given here.

.3.7.6 Duplicate Quote

This only appears when editing an existing Quote. Copy appropriate data from this screen into which of the following: <P> Quote Items
 Adjustments
 Quote Roles
 Quote Attributes
 Quote Coefficients <P> Check the box if you want the information to crossover into any or all of the above.

.3.8 Quote (edit)

.3.8.1 EditQuote

id:[13453] image:

Make changes to the basic quotation from this screen. You can see differences from earlier screens, above.

.3.8.2 link buttons

[Submit] <B> [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.8.3 Quote ID

This cannot be changed without creating a new quote. The Quote ID is the number which pulls all the details of the quotation together. It created when you clicked to [Submit] the new Quote.

.3.8.4 Quote Type ID (drop-down box)

Other, Product, and Proposal are generic types; others could be programmed in.

.3.8.5 Party ID (popup search tool)

Popup search engine provides help locating the ID number for the Party to whom the quotation was directed.

.3.8.6 Quote Issue Date (popup calendar)

This is the date that the Quote is given to the party requesting it, not necessarily the date it was prepared.

.3.8.7 Status

Status could be: <B><P> Created
 Approved
 Ordered
 Rejected</B>

.3.8.8 Currency (drop-down box)

Choose the currency used as the basis of this quotation from the drop-down box: US Dollars, Lira, Dinars, Reals, etc.

.3.8.9 Product Store (drop-down box)

When your business includes more than one entity, this is where you specify which is offering the Quotation.

.3.8.10 Valid From Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This From Date is the beginning of that period.

.3.8.11 Valid Thru Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This Thru Date is the ending of that period.

.3.8.12 Quote Name

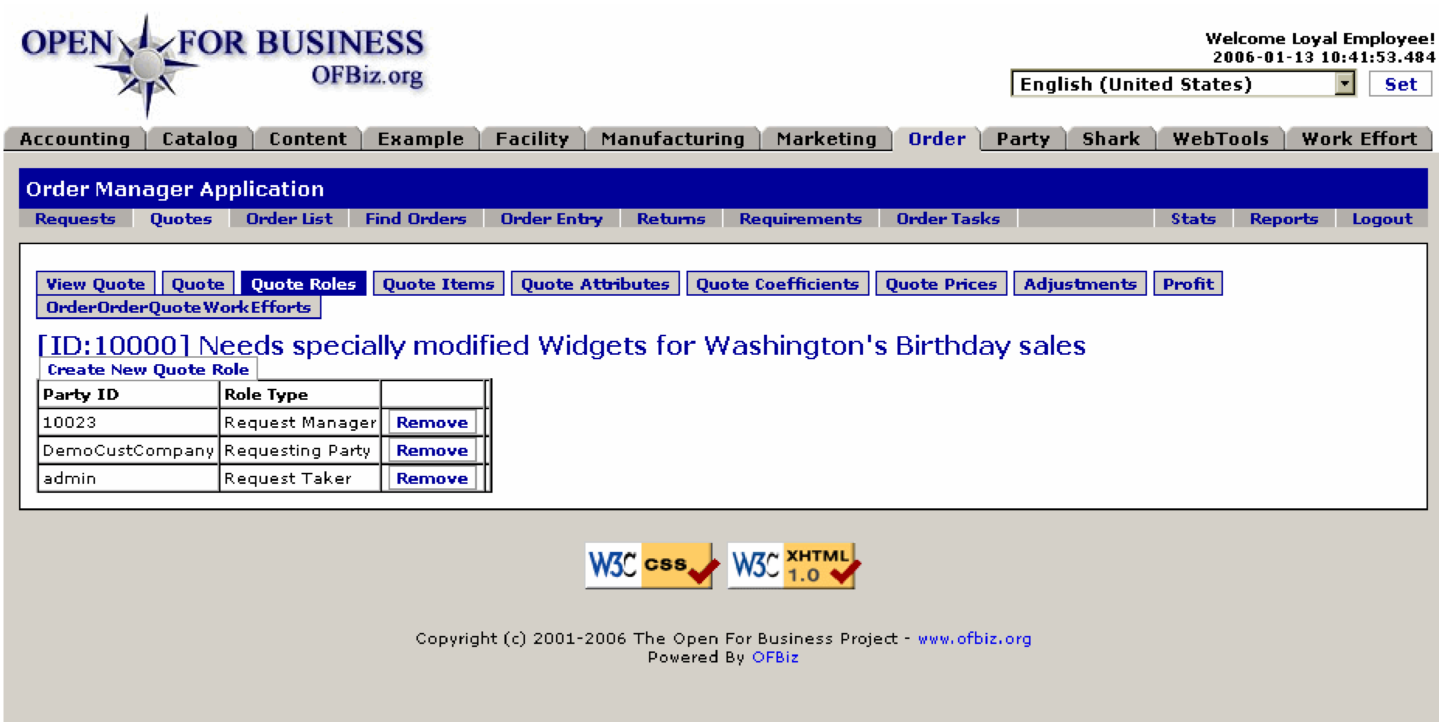
The Quote Name helps to quickly recognize what the Quote is for. <P> You might, for example, name it 'Johnson's June Request for 50 Gizmos.' That would distinguish it from most other Quotes by specifying the customer (Johnson), the month it was requested (June), the quantity (50) and the product (Gizmos).

.3.8.13 Description

Comments here can help to distinguish later from among many similar quotations. You can also bring in other details requested by the customer so that those preparing the Quotation can better understand what is expected. Likewise, if extra features are to be included above what was requested, have them here so that they can be discussed easily with the customer.

.3.9 Quote Roles

.3.9.1 ListQuoteRoles



Roles are list in and/or removed from this table. [Create New Quote Role] brings up a tool for adding new Roles.

.3.9.2 link buttons

[Create New Quote Role] [Remove] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.9.3 Party ID

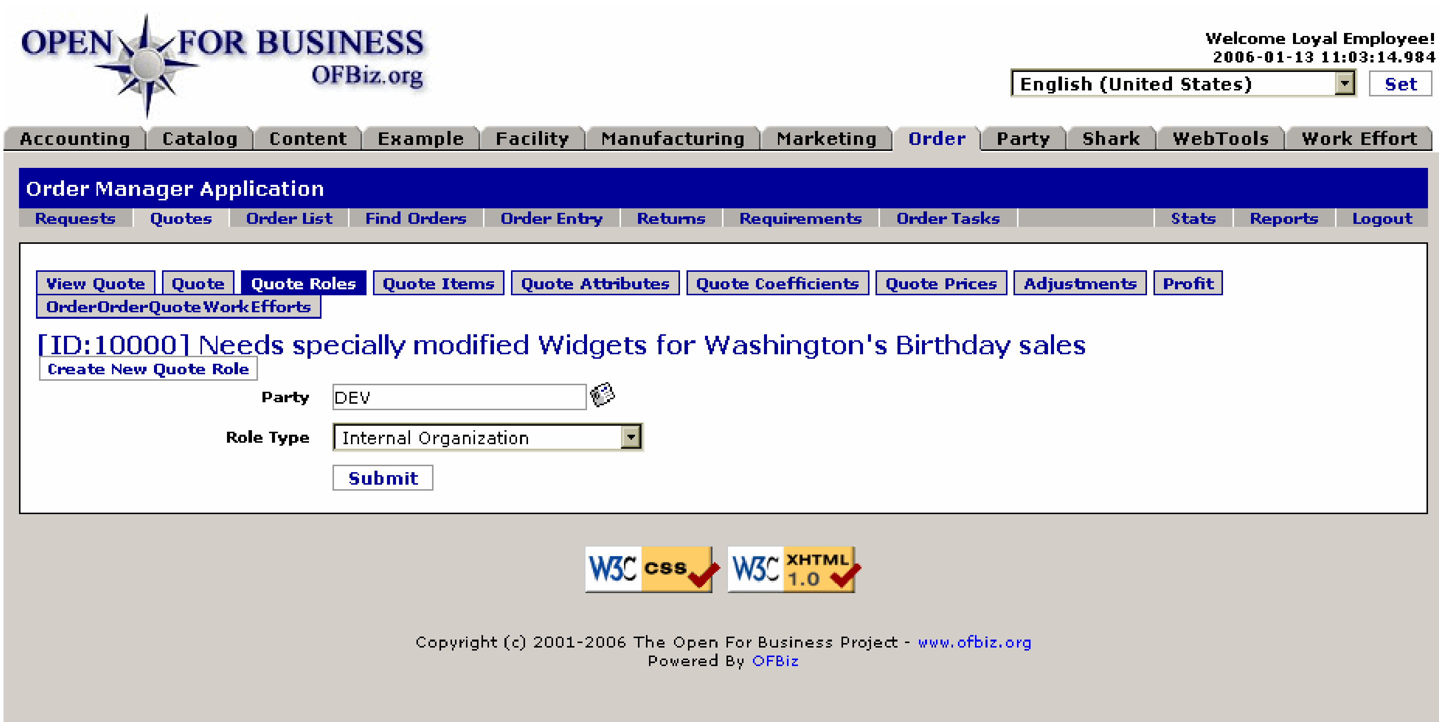
The Party ID as known in the system.

.3.9.4 Role Type

What Role does the Party play in this Quotation effort or its fulfillment?

.3.9.5 Create new role

.3.9.5.1 createQuoteRole



Associate a Party and its Role in this quotation process from this screen; click the [Quote Roles] tab to return to the table above.

.3.9.5.2 link buttons

[Create New Quote Role] [Submit] <B> [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.9.5.3 Party (popup search tool)

Identify the Party using the popup Search Tool.

.3.9.5.4 Role Type (drop-down box)

Select the appropriate Role from the drop-down box. <P> As always, the Role must be one applicable to the Party. If the Role is not accepted by the system here, use the Party Manager > Role tool to authorize the Role you need.

.3.10 Quote Items

.3.10.1 ListQuoteItems

All quoted Items for the Quote are listed here by number; click the Quote Item Seq Id number to edit the Item.

.3.10.2 link buttons

[Create New Quote Item] [Remove] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.10.3 Quote Item Seq ID

Click the ID number to edit details.

.3.10.4 Product ID

The ID name (or number) for the product being offered at the quoted price.

.3.10.5 Quote WorkEffort ID

When an Event or Calendar item has been created under the Work Effort manager, this ID will link you to that item.

.3.10.6 View Request

A click on this number takes you to a screen showing details of the Customer's request where you can see more about this Request Item as part of the original Request under the Request tab.

.3.10.7 Quantity

The number of units upon which this quoted price is based.

.3.10.8 Selected Amount

Standing price for your company to acquire or manufacture the item.

.3.10.9 Quote Unit Price

The basic price per item at which you are prepared to offer the product although the actual delivery price will be affected by the Quote Coefficients and other aspects of the Quotation.

.3.10.10 Estimated Delivery Date

Usually the customer requests that items be delivered by a particular time as part of his quotation. If that delivery time cannot be met, this estimated Delivery Date shows what you are able to do. It might be the same date as their request, it could even be earlier. Remember, though, it is better to under-promise and over-deliver!

.3.10.11 Is Promo

Is this item part of an ongoing Promotional campaign?

.3.10.12 Edit or View Quote Items

Two different presentations of the Order Items are available. The first one discussed here is the 'New or Edit Order Item' screen. The same screen is used to create a new item or to edit an existing one; data is populated for the existing items. <P> When you click the hypenated number in the View Request column of the table above, you are presented with a slightly different screen which is based upon the information entered under the Request tab. You can edit that information there and are also presented with a link to add another Request Item.

.3.10.13 Edit Quote Items

Come to this screen by clicking on the Quote Item Seq ID number in the table above.

.3.10.13.1 EditQuoteItem

Here you will edit or Create the details of the Quote Item. Some fields will be populated from the original Request data.

.3.10.13.2 link buttons

[Create New Quote Item] [Submit] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.10.13.3 Quote Item Seq ID

When creating a new Quote Item, this number does not exist until the created Item has been Submitted. With each subsequent Item, the Sequence number is incremented up one digit. You can click on this number from the table of Quote Items to return to this screen for further edits.

.3.10.13.4 Product ID (popup search tool)

Popup search engine to locate the correct Product ID number.

.3.10.13.5 Features

Popup search engine helps you locate the specific feature related with the quoted product.

.3.10.13.6 Deliverable Type ID (drop-down box)

When Deliverables are specified, the Type may be given here in the drop-down list.

.3.10.13.7 Quote Skill Type ID (drop-down box)

Especially when quoting for a Services contract, Skill Types may be specified. Select one from those which will appear in this drop-down list.

.3.10.13.8 Quote UOM ID (drop-down box)

Select the currency forming the basis of the quotation.

.3.10.13.9 Quote Work Effort ID

This would identify the document detailing specific tasks, milestones, or other accomplishments that are not permanently related with a particular finished good or similar product. For example, applying OEM labels, modifications, etc.

.3.10.13.10 Cust Request ID

This would typically be the customer's Request For Proposal or Request for Quotation number. Include this number in your response so the customer can quickly associate your quotation with his request.

.3.10.13.11 Cust Request Item Seq ID

Within your customer's RFQ or RFP, there are probably several numbered items against which you are quoting. Associate this particular Quote Item Seq ID with the requested Item Sequence number to assure accurate consideration of your quotation.

.3.10.13.12 Quantity

This is the number of items (hours, units, pages) which will be multiplied by the Quote Unit Price and factored with the Quote Coefficient to determine the cost of your quotation. If this number is not the same as requested, be sure to explain the difference under Comments, below.

.3.10.13.13 Selected Amount

How many of the Quoted quantity is actually being selected by the Customer.

.3.10.13.14 Quote Unit Price

In the example illustrated, the unit price represents a volume discount from the book or list price asked for smaller orders for the product. The UOM ID should indicate the currency which forms the basis of this number.

.3.10.13.15 Estimated Delivery Date (popup calendar)

Assumptions drive this delivery date; those assumptions should be detailed in the Comments. For example, the date might be predicated upon receiving the order confirmation by a specific date. Also, if you anticipate a price increase in three months, and you could not deliver the requested volume at this price at that time, give a time restriction.

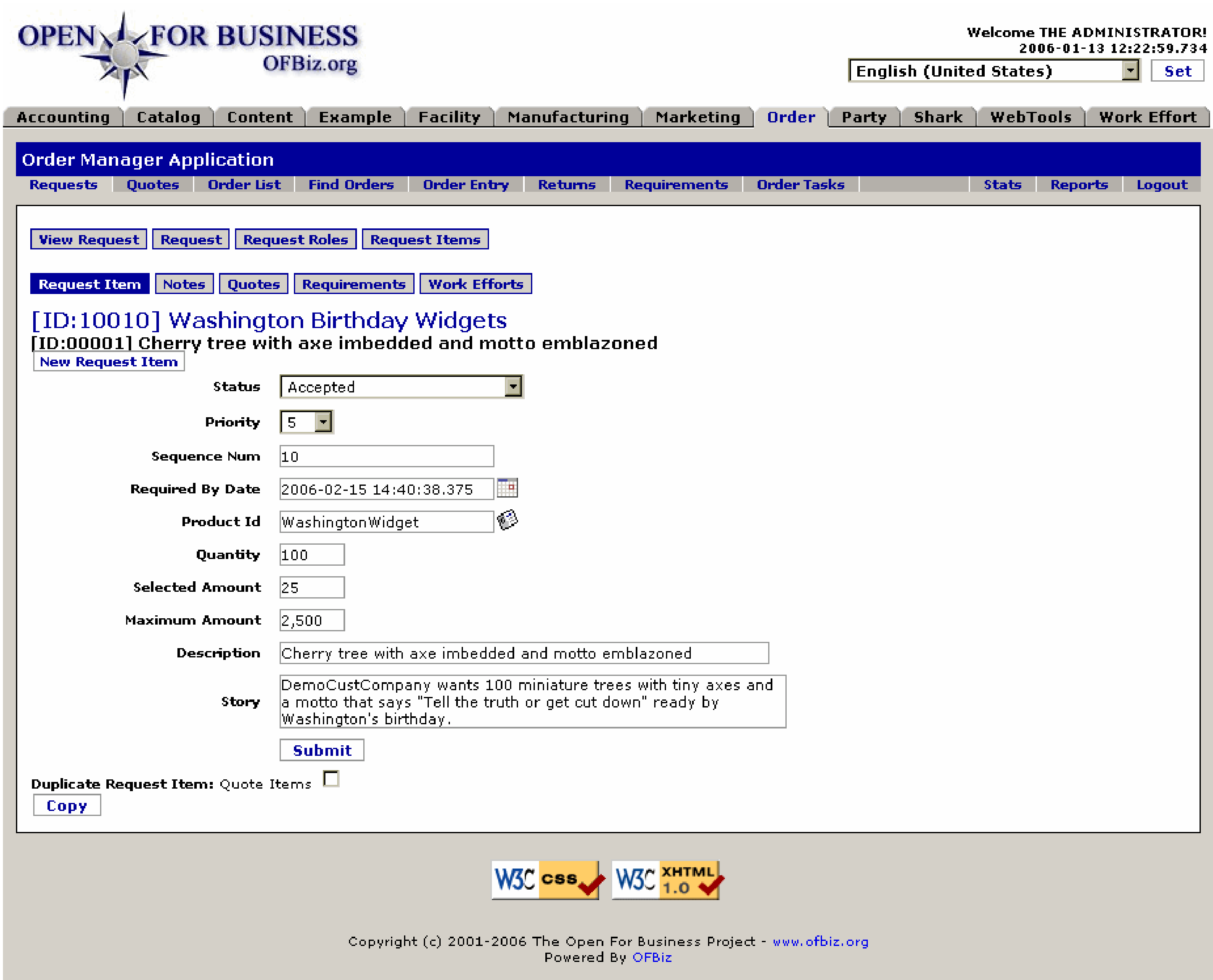
.3.10.13.16 Comments

Any explanations needed for variances from the original Request should be included here. Include information needed by others in your company to fully and completely prepare the formal Quotation document.

.3.10.14 Edit or View Request Item

Get to this screen by clicking on the hyphenated number under the View Request column in the table of Quote Items.

.3.10.14.1 requestitem-view



When you click on the View Request link in the table, this working screen is presented; note that you are under the Request tab.

.3.10.14.2 link buttons

[New Request Item] [Submit] [Copy] <B>[View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]</B>

.3.10.14.3 Discussion

For details of this screen, see the Requests tab, Edit Existing Requests, and select the Request Item sub-tab.

.3.11 Quote Attributes

.3.11.1 ListQuoteAttributes

Table of existing or special Quote Attributes which apply to this Quotation.

.3.11.2 link buttons

[Create New Quote Attribute] [Remove] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.11.3 Attribute Name

What the Attribute is called. Click on the Name to edit the Attribute.

.3.11.4 Attribute Value

What the Attribute will do for the customer. This can be changed: just click on the Attribute Name to edit the Value or the name.

.3.11.5 Create New Quote Attribute

.3.11.5.1 EditQuoteAttribute

New Attributes are created from this screen. You may also edit existing Attributes by clicking on the Attribute Name in the table.

.3.11.5.2 link buttons

[Create New Quote Attribute] [Submit] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.11.5.3 Attribute Name

What the Attribute is called.

.3.11.5.4 Attribute Value

How the Attribute affects the quotation or benefits the customer.

.3.12 Quote Coefficients

.3.12.1 ListQuoteCoefficients

Table of existing Quote Coefficients and their Value. To edit, you must remove and replace with a new Coefficient.

.3.12.2 link buttons

[Create New Quote Coefficient] [Remove] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.12.3 Coeff. Name

What the Coefficient is going to do.

.3.12.4 Coeff. Value

The mathematical value by which this Coefficient will affect the amount of the Quotation.

.3.12.5 Discussion of Order Quote Coefficients

Quote Coefficients and Quote Prices pages are designed to be used together.
 On the Quote Coefficients page, a user can enter numeric coefficients, for example:
 -- HANDLING_COST_COEFF = 10 (i.e. 10%)
 -- PACKING_COST_COEFF = 5 (i.e. 5%)
 These coefficients are used to modify the products' average costs and to provide a default price for each product in the quote. <P> You can see this in action in the Quote Prices page. In the top part of the screen you can see the list of coefficients and their value:
 -- HANDLING_COST_COEFF: 10
 -- PACKING_COST_COEFF: 5
 The total sum of the coefficients:
 -- totCostMult: 15<P> The multiplier that will be applied to the products' average costs:
 costToPriceMult: 1.176
 This number is obtained by the following formula:
 1 / (1 - totCostMult / 100)<P> In the Quote Prices screen are shown for each product:
 -- the average cost (from ProductPrice)
 -- the default unit price (for this quote) {this is the result of average_cost * costToPriceMult}
 -- the quote unit price {this is the content of the QuoteItem.quoteUnitPrice field} <P> If you check the items in the items in the list and submit the form, the default unit prices are stored in the QuoteItem.quoteUnitPrice fields. If you enter a value in the ManualUnit Price field, that value is stored instead of the default one.<P> NOTE: For this to work at all, you must have first established a price identified as the 'Average Price' for the Product under the Catalog Manager, Main Screen, Prices tab (EditProductPrices).

.3.12.6 Edit Quote Coefficients

.3.12.6.1 createQuoteCoefficient

Create a new Quote Coefficient at this screen. Coefficients are Quotation-specific, not universal.

.3.12.6.2 link buttons

[Create New Quote Coefficient] [Submit] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.12.6.3 Coeff Name

Give the Coefficient a unique name which clearly indicates the purpose for the Coefficient.

.3.12.6.4 Coeff Value

Enter a whole value here in percentage. For example, an 11.5 per cent coefficient is entered as '11.5' and the process will use it as 0.115 in the calculations.

.3.13 Quote Prices

.3.13.1 ManageQuotePrices

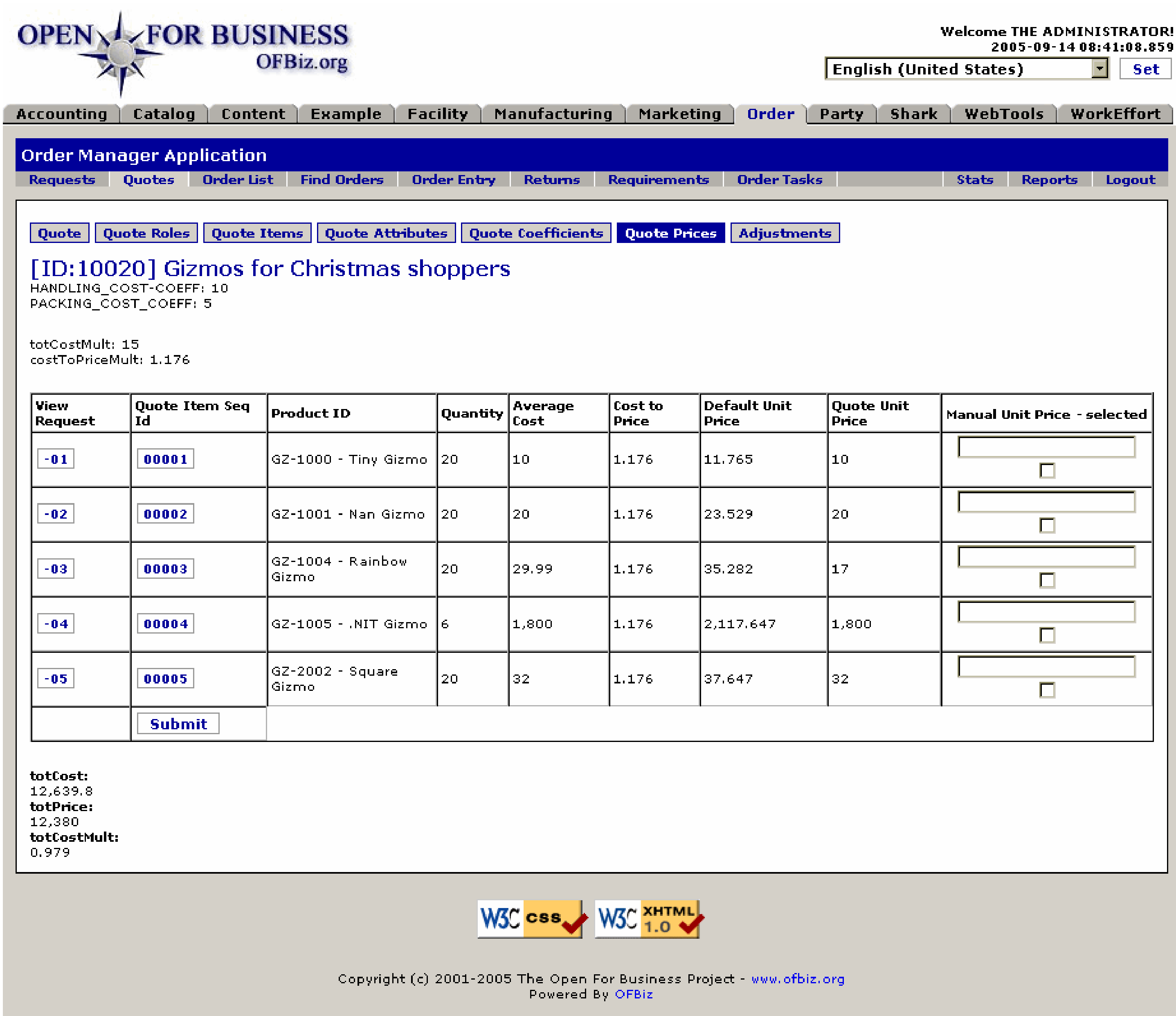


Table of quoted and computed prices with the Cost Multiplier calculated in.

.3.13.2 link buttons

[Submit] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]</B>

.3.13.3 View Request

Click on this number and you are taken to the Requests tab where you can view the original RFQ details.

.3.13.4 Quote Item Seq ID

Takes you to the EditQuoteItem editing screen for this item.

.3.13.5 Product ID

Both the Product ID number and name are given here.

.3.13.6 Quantity

The number of units being quoted.

.3.13.7 Average Cost

If the Average Cost is maintained with the Product in your Catalog or Facility databases, it will be presented here. The Default Unit Price is calculated from the Average Cost, not the Quote Unit Price. See Item 3 in the example to observe the effect this has when there is a substantial difference between the Quote Unit Price and your established Average Cost.

.3.13.8 Cost To Price

The multiplier that will be applied to the products' average costs:
 costToPriceMult: 1.176
 This number is obtained by the following formula:
 1 / (1 - totCostMult / 100)<P> See above: Discussion of Order Quote Coefficients. Numbers given here are based upon the example in the screen shots in this section. Your numbers will vary, although the formula will remain the same.

.3.13.9 Default Unit Price

This is the Average Cost times the Cost to Price Multiplier.

.3.13.10 Quote Unit Price

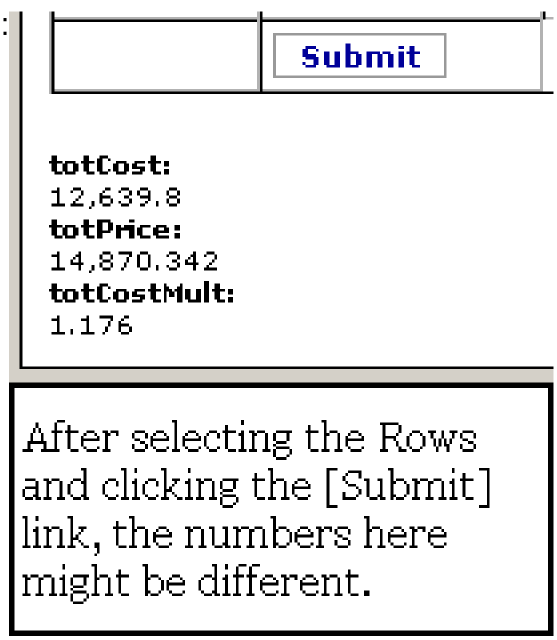
This is the Price quoted under the Quote Items tab.

.3.13.11 Manual Unit Price - selected

If the unit price was not posted under the Quote Items section, it can be established here in this column. <P> Click the check box in this column before pressing the [Submit] button if you want the row submitted.

.3.13.12 submitAction

id:[13100] image:



.3.14 Adjustments

.3.14.1 ListQuoteAdjustments

Once an Adjustment has been created, it is displayed in this table of adjustments. Click the ID to edit.

.3.14.2 link buttons

[Auto Create Adjustments] [Create Manual Adjustment] [Remove] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.14.3 Discussion

The content of the columns in the table are discussed by the same title in the following section, Create Manual Adjustment.

.3.14.4 Create Manual Adjustment

.3.14.4.1 EditQuoteAdjustment

Edit or Create a new manual Adjustment to your Quote from this screen.

.3.14.4.2 link buttons

[Create Manual Adjustment] [Submit] <B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]</B>

.3.14.4.3 Quote Adjustment ID

After the Quote Adjustment has been created, it is assigned an ID number for tracking and associating with the Quotation. This number cannot be changed.

.3.14.4.4 Order Quote Adjustment Type ID (drop-down box)

Select from the drop-down box one of the following types: <P><B> Promotion
 Replacement
 Discount
 Fee
 Miscellaneous Charges
 Sales Tax
 Shipping and Handling
 Surcharge
 Additional Feature
 Warranty</B>

.3.14.4.5 Quote Item Seq ID

Which item in the Quotation is affected by this Adjustment? As the Adjustments are based upon this Quote Item Seq Id, if every Item is to be adjusted, you will need to create an adjustment for each item.

.3.14.4.6 Description

What are you doing with this Adjustment? Answer as completely yet concisely as possible.

.3.14.4.7 Amount

Whether a percentage or a flat sum of adjustment, put the working number in here.

.3.14.4.8 Items in table from Automatic Adjustment

.3.14.4.8.1 Product Promo ID

If you wish to invoke a Promotion as part of this Adjustment, enter the Promo ID here.

.3.14.4.8.2 Product Promo Rule ID

If the Product Promo is expressed as a Rule, enter the ID here.

.3.14.4.8.3 Product Promo Action Seq ID

If invoking a particular Action Sequence from the specified Promo or Promo Rule, enter that here.

.3.14.4.9 Corresponding Product ID

Specify the Product ID here. While the Seq ID of the Quote might be memorable, it is often easier to recognize the Product whose price you are quoting.

.3.14.4.10 Source Percentage

Enter this as a number but keep the decimal point to the right. For example, 33-1/3 percent would be entered as 33.33, NOT 0.3333.

.3.14.4.11 Exempt Amount

Whatever portion of the Quote Price that is not being affected by this Adjustment is entered here.

.3.14.4.12 Include in Tax (Y/N)

Will the amount of the Adjustment be included in the Tax determination?

.3.14.4.13 Include in Shipping

Particularly if Shipping costs are a percentage of the sales amount, will the Adjustments be included when calculating the costs for Shipping?

.3.15 Profit

.3.15.1 ViewQuoteProfit

.3.15.2 link buttons

<B>[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts] </B>

.3.16 OrderOrderQuoteWorkEfforts

.3.16.1 ListQuoteWorkEfforts

.3.16.2 link buttons

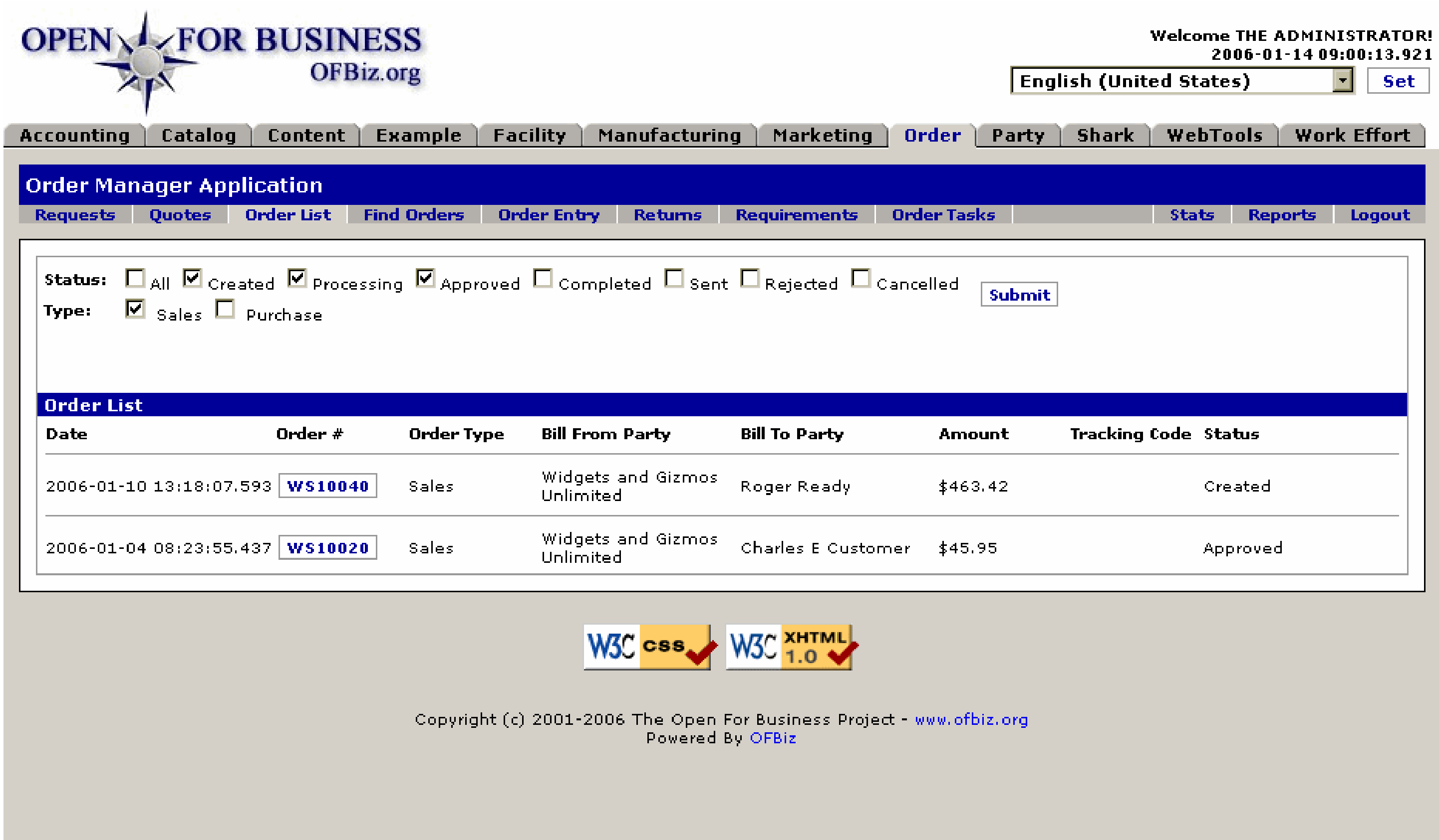
[Create New Quote] [Delete]

.4 Order List

When opening up the Order Manager, the Main Screen you see (this default screen) is actually the Order List screen. If you are seeking open orders, currently being processed at one of the earlier levels of Status, the returned List will probably be manageable. Over time, when you have completed hundreds of orders, you might need to use the Find Orders tab to locate your order using its more refined search tool.

.4.1 main

id:[12805] image:



This is the default screen for the Order Manager. Find orders quickly by Status and/or Type.

.4.2 link buttons

[Submit]

.4.3 Status

Check a box for 'All' the orders or a box matching the Status of the orders you seek. Default selection (shown when the Order List tab is clicked) is <B>All</B>. Select from one of the following: <P><B> All
 Created
 Processing
 Approved
 Completed
 Sent
 Rejected
 Cancelled </B>

.4.4 Type

Check a box matching the Type of Order you are seeking. Default type is Sales Order. Choose one from the following: <P><B> Sales
 Purchase </B>

.4.5 OrderList table

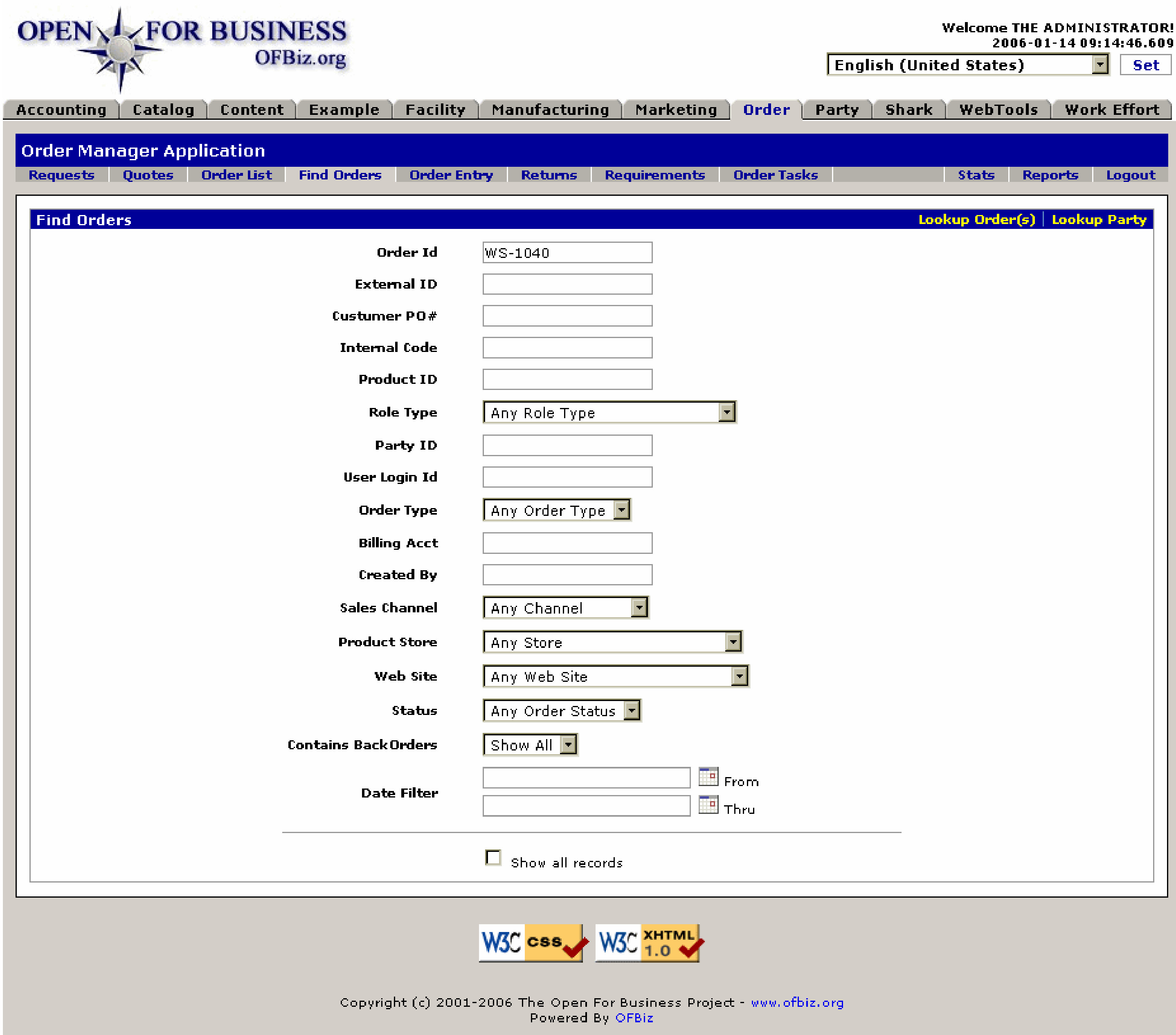
Click on the number in the Order # column to view and/or edit an existing order. Information is given about each order in the following columns: <P><B> Date
 Order #
 Order Type
 Bill From Party
 Bill To Party
 Amount
 Tracking Code
 Status</B>

.5 Find Orders

As you enter the information you have about an order, remember that each additional parameter you introduce will probably reduce the number of returns. If any item entered is erroneous, you might not locate the Order you seek. Therefore, unless you have the actual Order ID or customer Purchase Order number, try entering only one parameter at first, see if the return is too large, enter another parameter, and so forth. <P> You may also search for only those orders entered by a specific employee (User Login ID or Created By) for a specific date, or search for all the orders for a particular Product ID by a certain customer, etc.

.5.1 findorders

id:[DOCORD371] image:



Remember that each additional parameter entered will reduce the number of returns and also increase chance of entering errors.

.5.2 link buttons

[Show All Records] <B> [Lookup Order(s)] [Lookup Party] </B>

.5.3 Lookup Orders

.5.3.1 Order ID

.5.3.1.1 If specific, ...

If you have the specific Order ID, this will return the exact order you specify.

.5.3.1.2 Partial Order ID numbers

Partial Order ID numbers will NOT return a list of possible orders. For example, if the order number starts with 1000_, but you cannot recall the last digit, it is not possible to retrieve a group of the orders matching that partial ID.

.5.3.2 External ID

If an ID from an outside company is used, it would be found here.

.5.3.3 Customer PO#

.5.3.3.1 Assigned Purchase Order number

This is the PO associated with the order at the time it was placed.

.5.3.3.2 Multiple orders on same PO

If more than one order is created from the same PO #, a list of all the orders under that PO # is returned. This is possible when working with many companies that have similar numbering schemes, or one blanket PO with multiple order actions.

.5.3.4 Internal Code

If some other Code number from an internal source applies, that would be here.

.5.3.5 Product ID

Accuracy is CRITICAL: the Product ID must be entered exactly to get a valid return.<p/> Results: All orders involving the purchase or sales of the entered ProductID will be returned.

.5.3.6 Role Type (drop-down box)

This is often used along with the Party ID field. If an order was placed for a Party that has placed orders under more than one Role, this selection will limit returns to the Party's order(s) in the selected Role only.

.5.3.7 Party ID

Will bring up orders associated with the selected Party. The Role Type field is often used along with this; see description above.

.5.3.8 UserLogin ID

The UserLogin ID is what a User uses to login to the system, and is associated with a single party. A Party may have more than one UserLogin ID.

.5.3.9 Order Type (drop-down box)

This could be a Purchase Order, a Sales Order, a Work Order, or other order type.

.5.3.10 Billing Acct

Use this field to find orders placed against the specified Billing Account. This is often used for orders that are invoiced on fulfillment and payment is received later.

.5.3.11 Created By

Use this field to find orders created by the Party with the specified UserLogin ID. For example, if you wanted to find all the orders that you, as an order taker, processed yesterday, this is where you would enter your UserLoginID.

.5.3.12 Sales Channel (drop-down box)

Which path did the order take coming into your facility? Use the drop-down box to select from among the following: <P><B> Any Channel
 Web Channel
 POS Channel
 Fax Channel
 Phone Channel
 E-Mail Channel
 Snail Mail Channel </B> [postal service] <B>
 Affiliate Channel
 Unknown Channel </B>

.5.3.13 Product Store (drop-down box)

Limits the search for orders to those placed through a specific store.

.5.3.14 Web Site (drop-down box)

For web-based orders, limits the search for orders to those placed through a specific web site.

.5.3.15 Status (drop-down box)

Select from one of the following: <P><B> Any Order Status
 Created
 Sent
 Processing
 Approved
 Completed
 Rejected
 Canceled</B><P> This constraint could be useful when seeking, for example, only the orders for a customer which have been Approved but are not yet Completed. A combination of the Party ID and the Created Status should return a list of those orders.

.5.3.16 Contains Back Orders (drop-down box)

If 'Show All' is selected, all orders with or without Back Orders are displayed. If 'Only' is selected, then only orders having back orders are displayed.

.5.3.17 Date Filter (from/thru calendar popup)

Limits order to the specified date range. Used to exclude orders outside the timeframe specified.

.5.3.17.1 From date

From date means that no orders placed before that date will be returned.

.5.3.17.2 Thru date

Thru date means that orders placed after that date will not be returned.

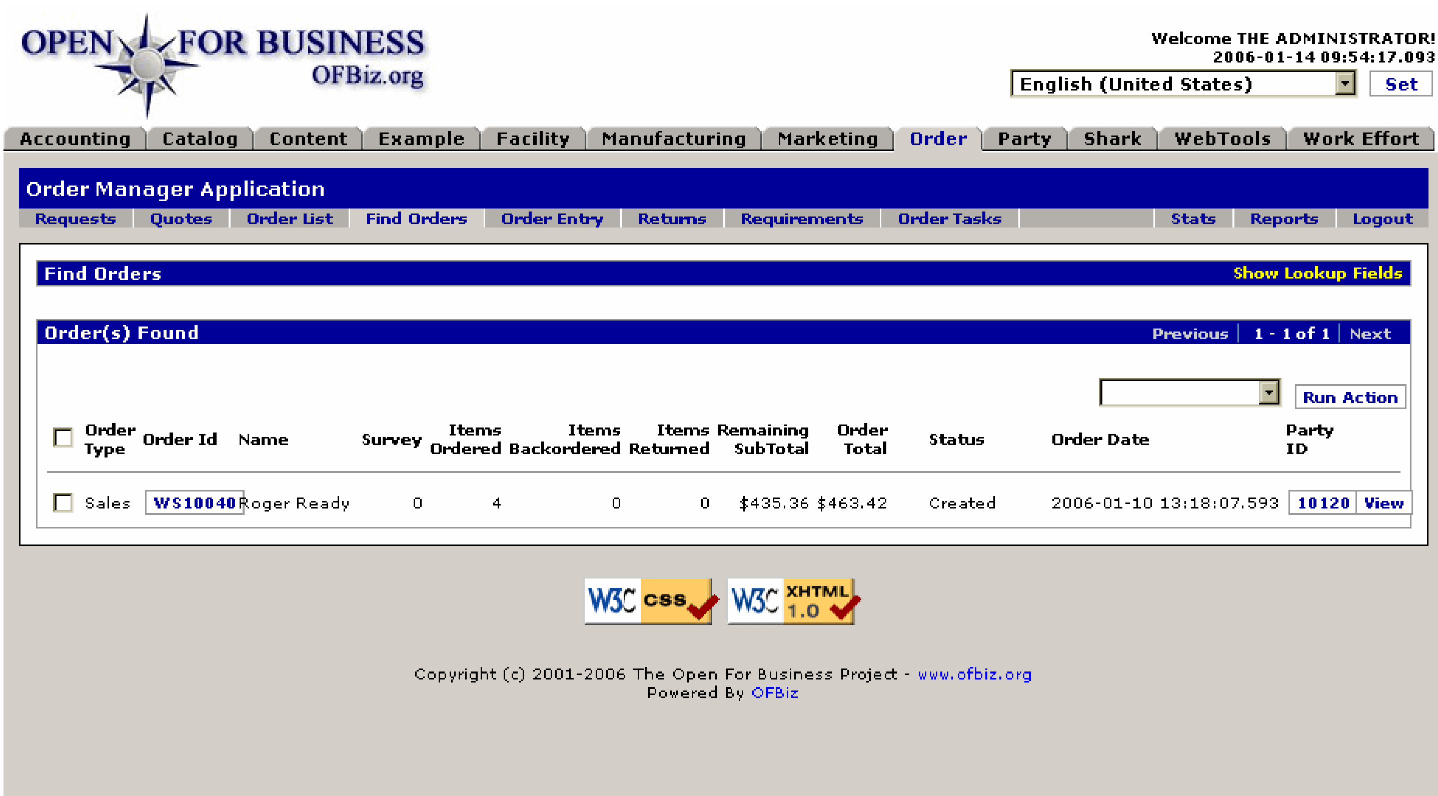
.5.3.18 Show All Records (checkbox)

When no other parameters are entered, clicking on this box acts like a link button, returning all existing records. <p> When this box is checked along with a few parameters, all records meeting those parameters are returned. For example, choosing 'Approved' under Status with this checkbox marked will return all of the approved orders. <p> HINT. If you know that an order exists but your search efforts have not been fruitful, you might try clearing all parameters and then clicking on the checkbox 'Show All Records.' This powerful command will return a display of all existing records through which you can scan visually. When there are many records, though, both the operation and the scan might take a lot of time.

.5.4 Orders Found

When the exact Order ID is entered, the View Order screen (below) is returned with that order. <p> If a search returns more than one order or if the box [Show all orders] is checked with no search parameters given, the following table of existing or matching orders is returned. <p> When you spot your sought-for order, click on the Order ID number to go to that order. <p> If too many orders are returned (multiple pages), click on [Show Lookup Fields] and enter a few parameters to reduce the search results.

.5.4.1 findorders-found



Click on the Order ID or [View] to work with the order. Choose "Pick Orders" or "Approve Orders" and click to [Run Action].

.5.4.2 link buttons

[View] [Previous] [Next] [Run Action] <B>[Show / Hide Lookup Fields] [Lookup Order(s)] </B>

.5.4.3 Run Action (drop-down box)

When an Order has the box checked beside it, you can invoke one of the following actions for the selected Order(s). This saves you the step of opening the order and then invoking the action.<P> Select from the drop-down box and click [Run Action].
<B> Approve Orders
 Pick Orders</B>

.5.4.4 Select order check boxes

When there is a box checked to the left of the Order, the [Run Action] command will apply to that order. If the top box (not beside any specific order) is checked, all boxes will be selected. <P> This allows you to find all orders that have, for example, been created but not Approved. By selecting each of those boxes and doing the Run Action 'Approve Orders', that process will be run in a batch. This will save the tedium of pulling each order individually for that purpose. Similarly, all Approved orders could be found, selected, and have the 'Pick Orders' Action run for them all.

.5.4.5 Order Type

Generally Sales Order or Purchase Order.

.5.4.6 Order ID

Links to View order.

.5.4.7 Name

Name of the party placing the order. Click on the Party ID in another column to see details about the Party.

.5.4.8 Survey

If the Party completed a Survey while placing the order, that information is reported here.

.5.4.9 Items Ordered

How many items total were ordered or added to the order as part of a promotion.

.5.4.10 Items Backordered

Those Items in the order which are not currently available to fulfill the order.

.5.4.11 Items Returned

If the Order is mature enough to have already shipped at least some of the items and if any of those items have already been returned, the number of returned items is given here.

.5.4.12 Remaining Subtotal

The value of the items remaining to shipped. Does not include shipping costs.

.5.4.13 Order Total

The total cost including shipping that has been or will be charged to the ordering party.

.5.4.14 Status

Order creation and fulfillment is a process. The Status indicates where this order currently exists along that path from Creation through Completed.

.5.4.15 Order Date

When the order was placed; includes time.

.5.4.16 Party ID

Links to View Party.

.5.5 Orders Created but Not Approved

.5.5.1 Order Confirmation

id:[14455] image:

Order Confirmation #WS10000

Order for	Sherry Shopper [10010]
Destination	To: Sherry Shopper 1234 S Main St. Orem, UT 84058 USA
Method	UPS Guaranteed Next Day
Splitting Preference	Please wait until the entire order is ready before shipping.
Gift?	This order is not a gift

When an order has been Created but not yet Approved, an Order Confirmation # appears. Click on number to Approve.

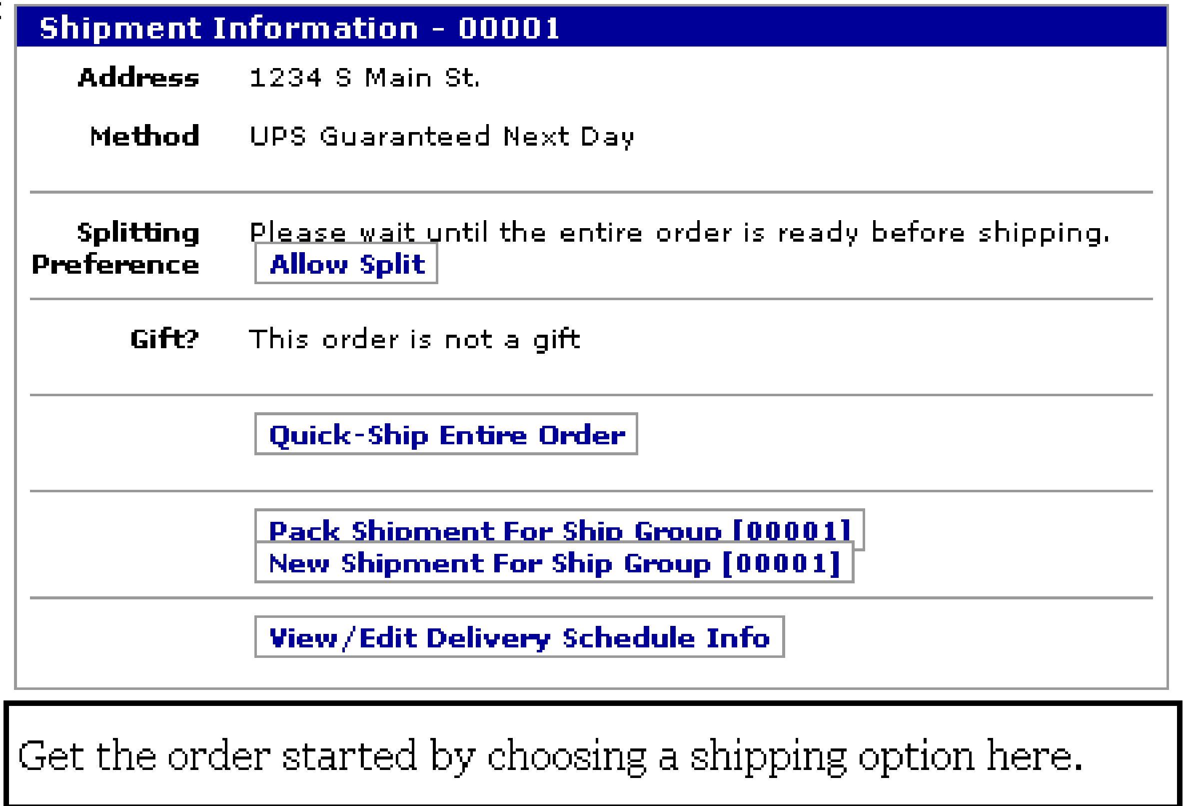
.5.5.2 Discussion

If an order falls outside specific parameters (e.g., a higher than usual order size or a new account), then the account management team needs to ensure that it 'looks right.' If needed, contact is made with the customer to ensure that it is not fraudulent. <P> All orders need to be manually approved using the 'Order Confirmation' link on the top left hand corner of the Order Detail screen, usually appearing in yellow to the right of those words: Order Confirmation #.

.5.6 Orders Approved but Not Shipped

.5.6.1 Choose Shipping

id:[14457] image:

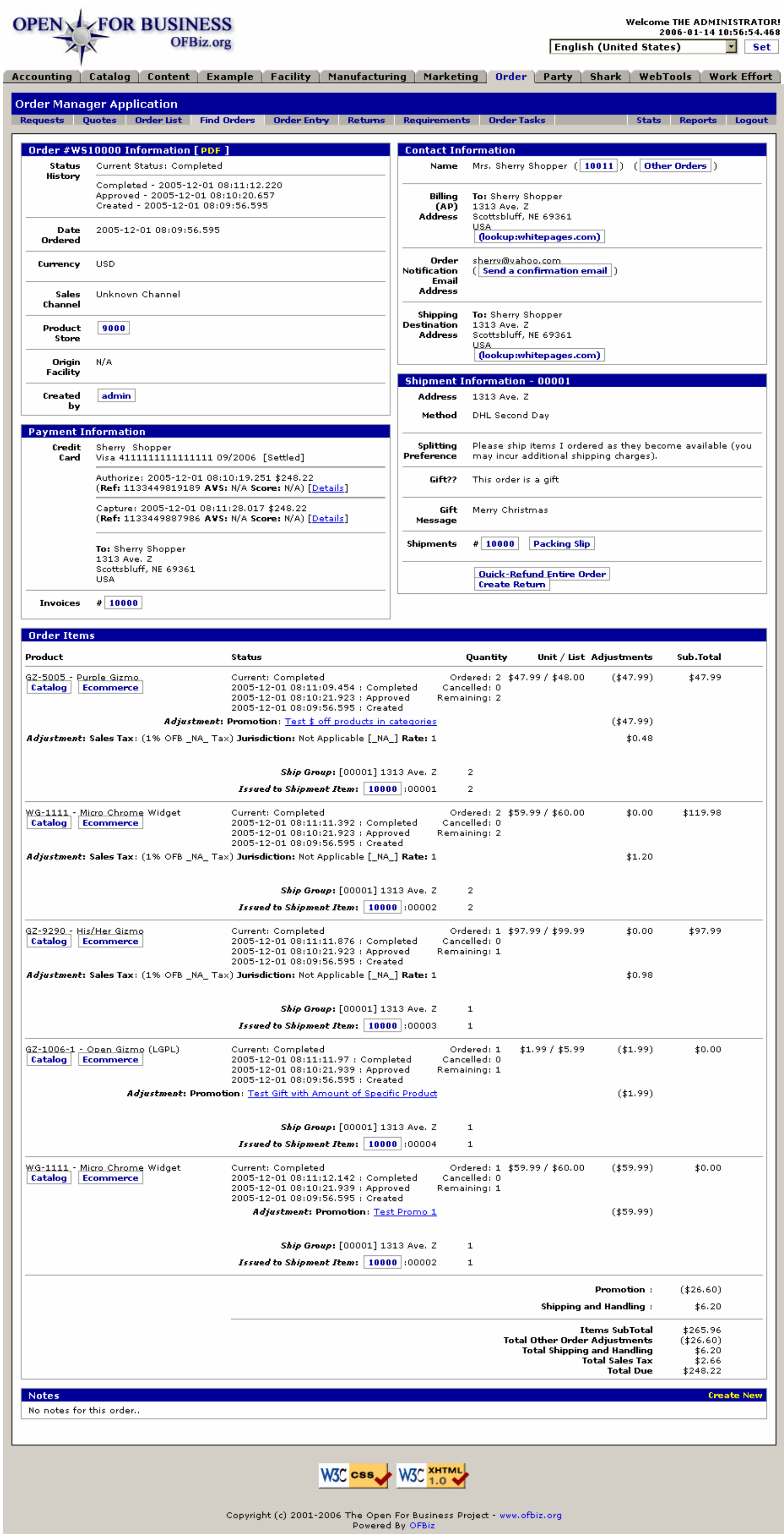


.5.6.2 Discussion

The next step is your bridge from the Order Manager processes into working with the Facility Manager to ship the products to the purchaser. In the Approved Order (shown below) the products have been shipped; the same section shown above has options for Returns instead of for Shipping. <P> Initially the links you need to choose between are <U> Quick-Ship Entire Order</U> and <U> Pack Shipment For Ship Group [00001]</U>. Quick-Ship will take care of all the details behind the scenes the prepare and ship the item(s) out the door. Pack Shipment invokes each of the steps needed to (1) Create the shipping documents, (2) 'pick' the order in the Warehouse, (3) pack the items, (4) schedule the shipment with the carrier, and all the other little details which are pretty much automated using Quick-Ship. <P> Until the products have all been shipped you will also have a link in this section to either create a <U> New Shipment For Ship Group [00001]</U> and/or to <U> View/Edit Delivery Schedule Info</U>. You can see more details about all of these steps in the Facility Manager documentation.

.5.7 View Order

.5.7.1 orderview



Order details will vary significantly. Needed or potential actions are displayed in yellow or blue links. This order is completed.

.5.7.2 Discussion

The details of the actual order screen are discussed more fully in a later section, <B>Order Entry - Sales Order</B>; see that section below.

.6 Order Entry - Sales Order

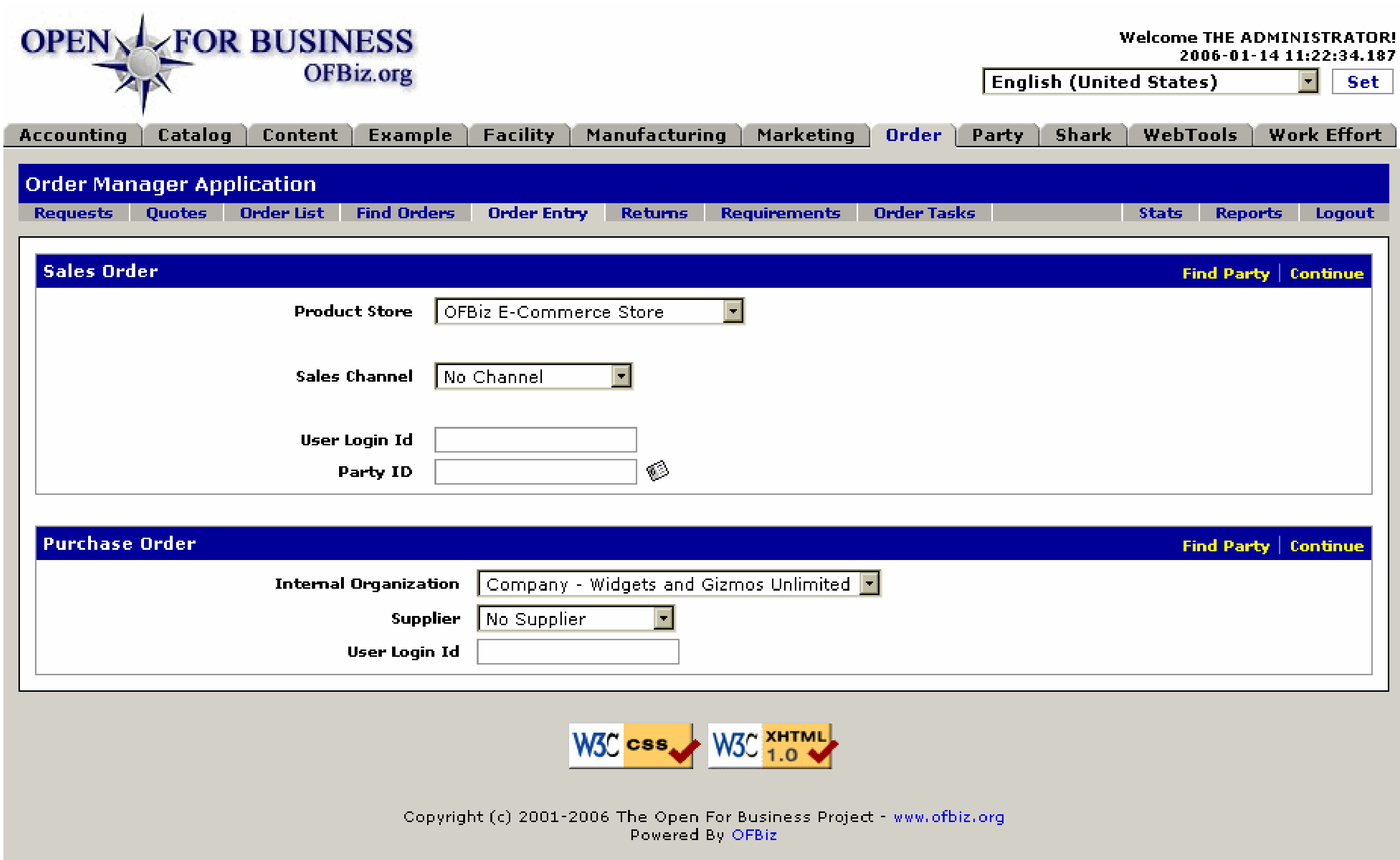
.6.1 Sales Order process

.6.1.1 Discussion

The very first step with any order is to identify your customer. If they do not have an ID within your system, go immediately to the Order Manager and create one! If they do have one, you will need that to proceed with the Order Process. <P>Begin the Order Entry process by completing the top (Sales Order) section of this form. See the following major section <B> Order Entry - Purchase Order </B> for discussion of the bottom portion which is used when purchasing from a supplier for your company. <p> Complete the Product Store and Sales Channel using the drop-down boxes, and identify the customer at this screen; [Continue] then takes you to the Sales Order Entry process, next.

.6.1.2 orderentry

id:[DOCORD465] image:



Both the Sales and Purchase Order processes begin with this screen. For your Sales Order, complete the top part, click [Continue].

.6.1.3 link buttons

[Find Party] [Continue]

.6.1.4 Product Store (drop-down box) *

Choose the Store through which this order will be processed from the drop-down list. Required entry.

.6.1.5 Sales Channel (drop-down box)

What is the method this order arrived or is arriving at your facility? The choices from the drop-down box might include: <B> <p> No Channel
 POS Channel
 Web Channel
 FAX Channel
 Phone Channel
 E-Mail Channel
 Snail Mail Channel
 Affiliate Channel
 Unknown Channel</B>

.6.1.6 UserLogin ID

Either enter the User Login ID here, or the PartyID below, then click on [Continue].

.6.1.7 Party ID (popup search tool)

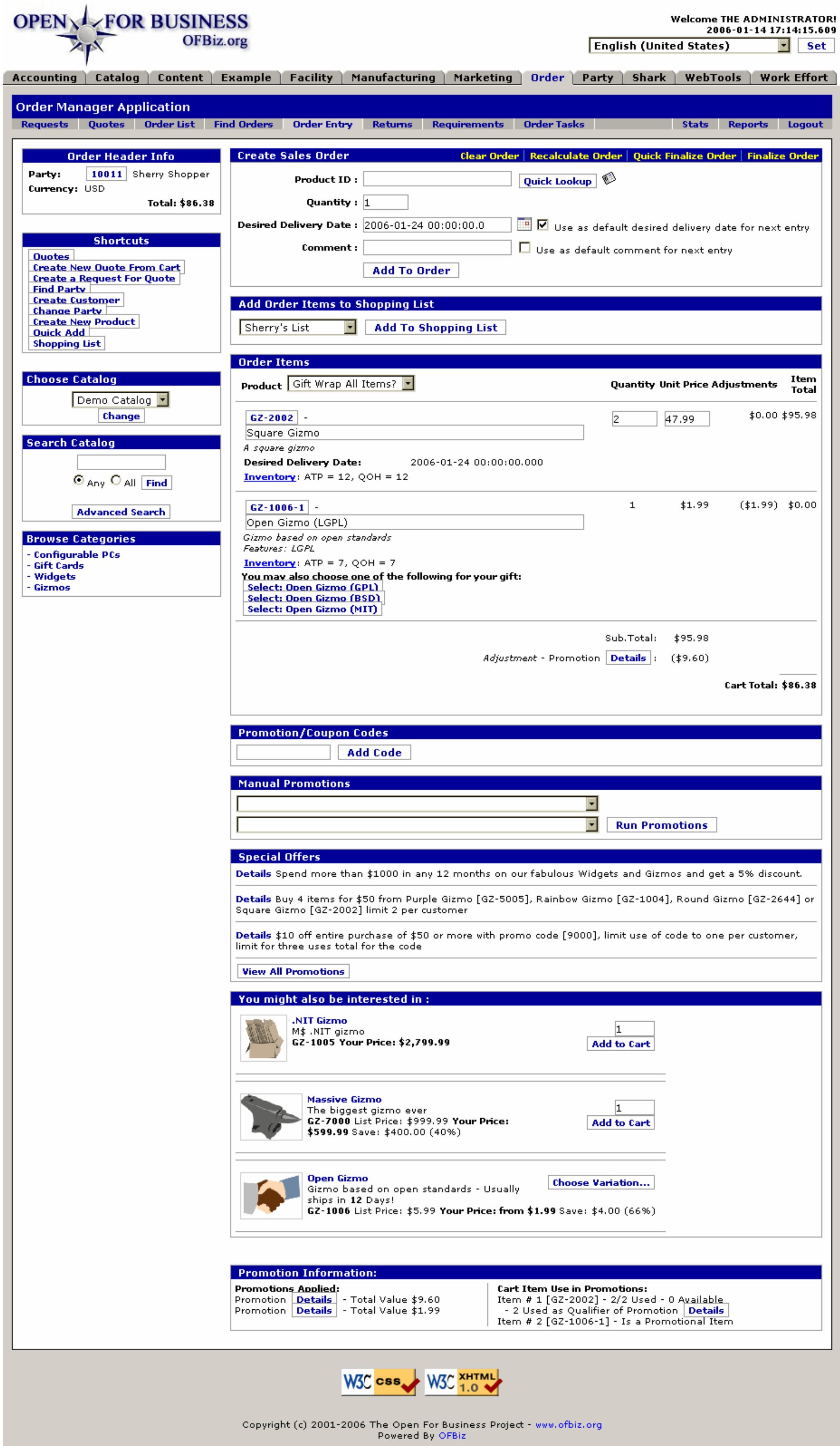
Either enter the PartyID here, or the User Login ID above, then click on [Continue]. You can use the popup search tool to help identify the PartyID.

.6.2 Sales Order Entry

.6.2.1 Discussion

You can return to this screen from the catalog selection windows by clicking on the Order Entry tab or the [Order Items] link. <p> NOTE: Order entry through the ecommerce website will be different from the process here in the OFBiz Order Entry tab.

.6.2.2 modifycart



Order Entry screen after completing the first entry. Note all the promotional and search features offered.

.6.2.3 link buttons

[Quotes] [Create New Quote From Cart] [Create a Request For Quote] [Find Party] [Create Customer] [Change Party] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Details] [Quick Lookup] [Add To Order] [Add To Shopping List] [Inventory] [Add Code] [Run Promotions] [View All Promotions] [Add to Cart] [Choose Variation] <B>[Clear Order] [Recalculate Order] [Quick Finalize Order] [Finalize Order] </B>

.6.2.4 <B>Order Header Info</B>

.6.2.4.1 Party

Includes Party ID number and purchaser's FirstName LastName. Click on the ID to view the Party Profile under the Party Manager.

.6.2.4.2 Currency

This is the Currency UOM ID. In this case shown, USD for US dollars.

.6.2.4.3 Total

This is a running total of purchases, less discount, but not including taxes, credits or shipping.

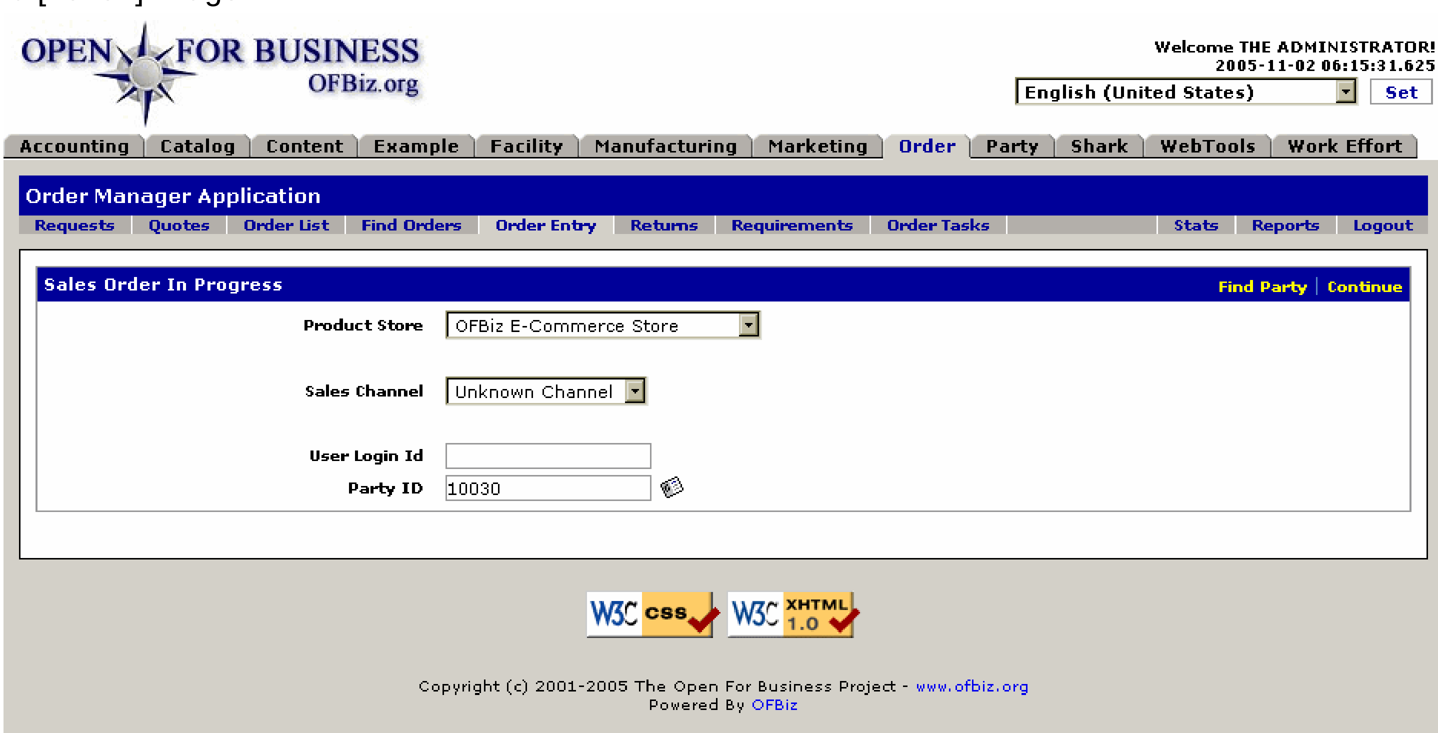
.6.2.5 <B>Shortcuts</B>

.6.2.5.1 Discussion

These links take you to related screens, often with data populated from wherever you are in the Sales Order Entry process. When you have jumped to these other processes, you can often return to your Order by clicking on the browser back button. It might take you to the following screen. Although it looks familiar, note the phrase, 'Sales Order In Progress.' Enter the User ID and press [Continue] to restore the Order Entry screen.

.6.2.5.1.1 additem-return

id:[13491] image:



Enter the Party ID then press [Continue] to return to the Order Entry in progress.

.6.2.5.2 Quotes

.6.2.5.2.1 FindQuoteForCart

id:[12817] image:

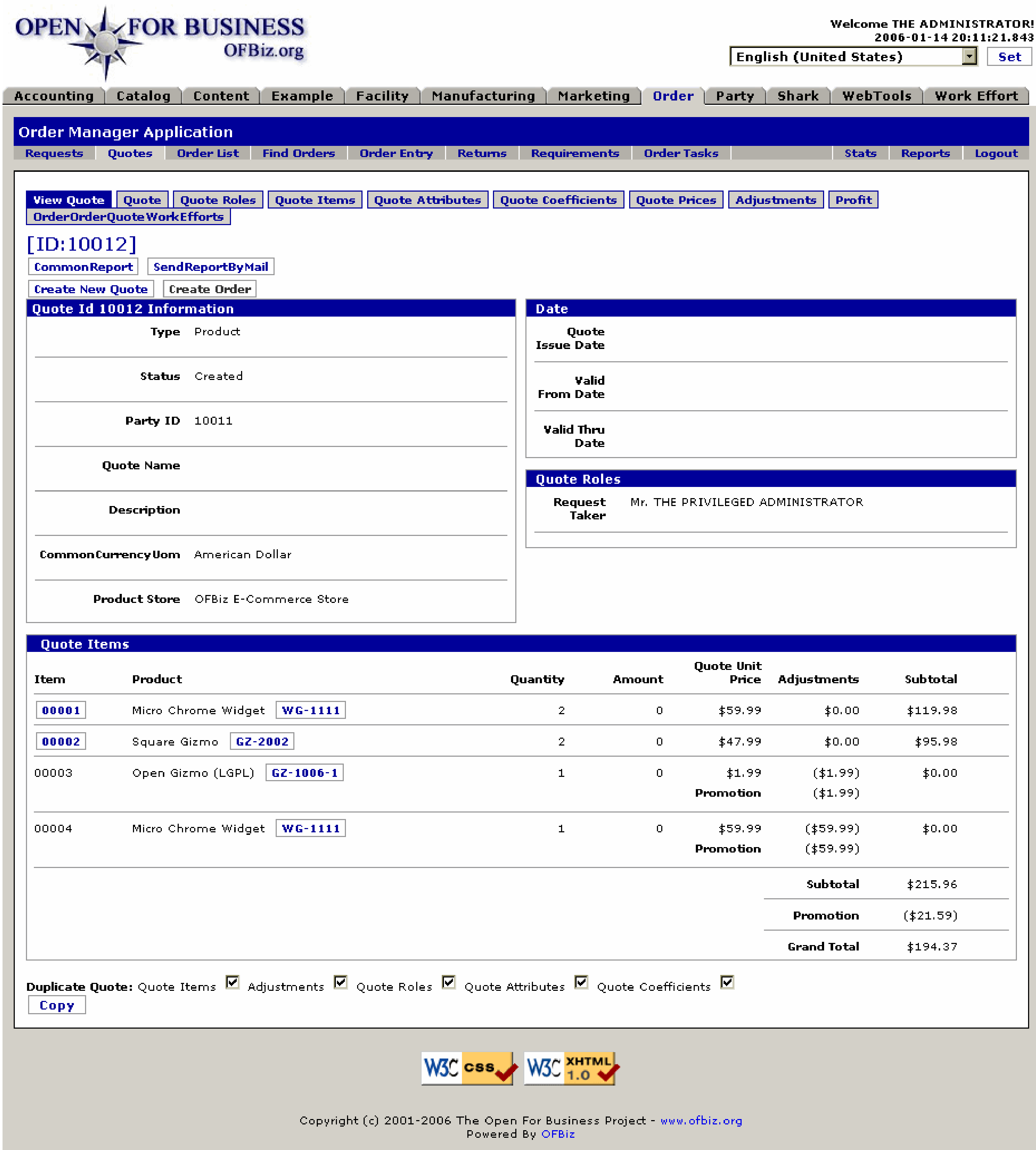
The table at the bottom remains empty until after a successful search. Only Approved or higher status Quotes returned.

.6.2.5.2.2 Discussion

If you attempt to search for a Quote which has been Created, but not yet Approved, the search will return empty. <P> Unlike most screens, if you click on the Quote ID, you will NOT view further details of the Quote. Rather, you are presented with an Order Entry screen to proceed with the Order based upon the contents of the Quote. Then, simply click on the main Order Entry tab and the Order Entry screen will be populated with the contents of the quote at the prices quoted therein.

.6.2.5.3 Create New Quote from Cart

.6.2.5.3.1 createQuoteFromCart



Enters the current items from the Order Entry into a new Quote at the Quotes tab > View Quotes sub-tab for further processing.

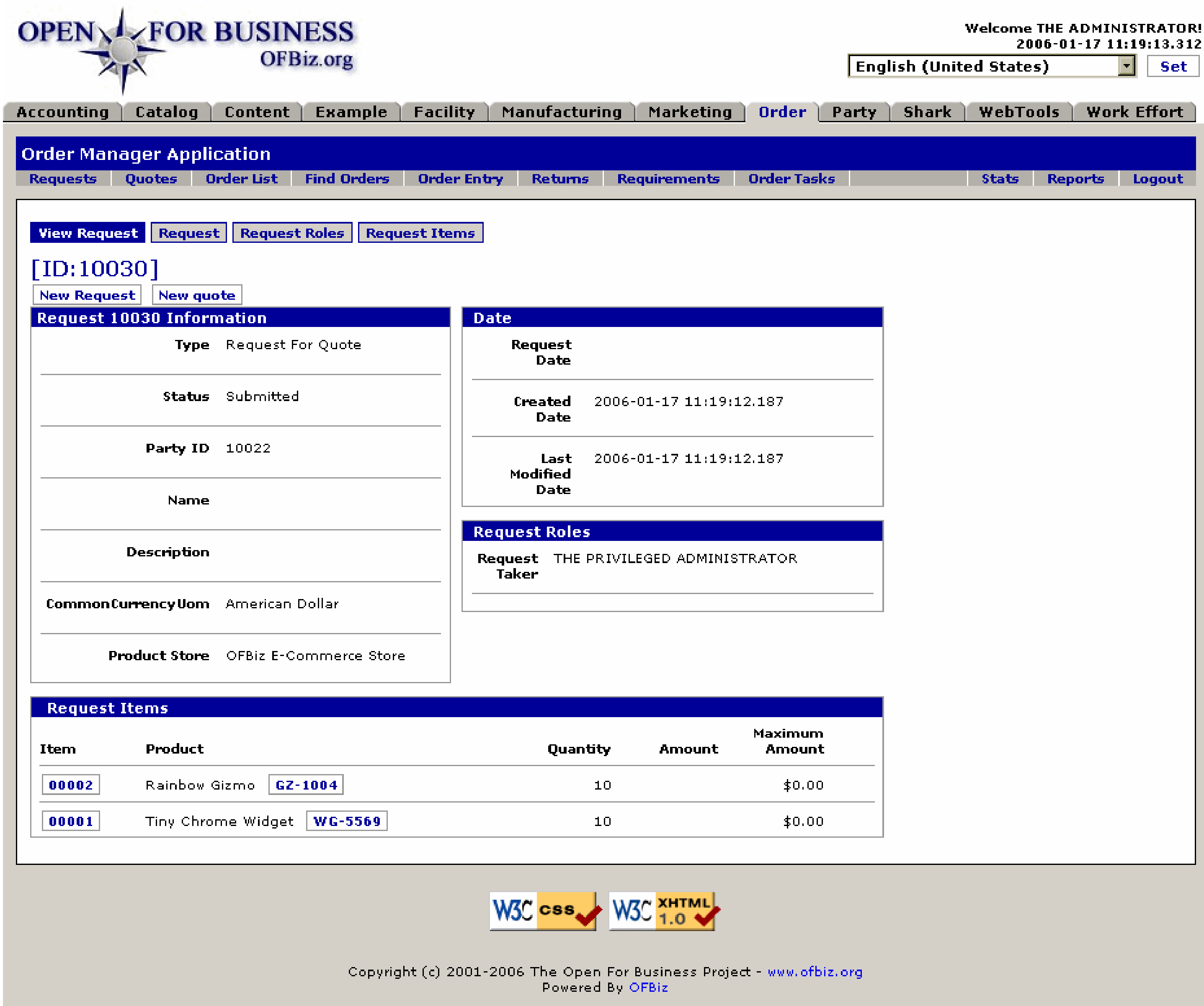
.6.2.5.3.2 Discussion

Note how all the Promotional items are also dropped into this Quote; their presence can be a negotiation point as you refine the Quotation with the customer.<p> From this point you could further refine the Quote through the normal processes under this Quote tab or return to the Order Entry process. Depending upon how far you were into the process, you can either back-button into your screen or click on the Order Entry tab.

.6.2.5.4 Create a Request for Quote

.6.2.5.4.1 createCustRequestFromCart

id:[13487] image:



This shortcut links you to the Requests tab with Party ID and items in place for a new Request for Quote.

.6.2.5.4.2 Discussion

From here you can develop the Request into a Quote or process the input as an inquiry. Or, you can return to the Order Entry screen if the customer is ready to order.

.6.2.5.5 Find Party

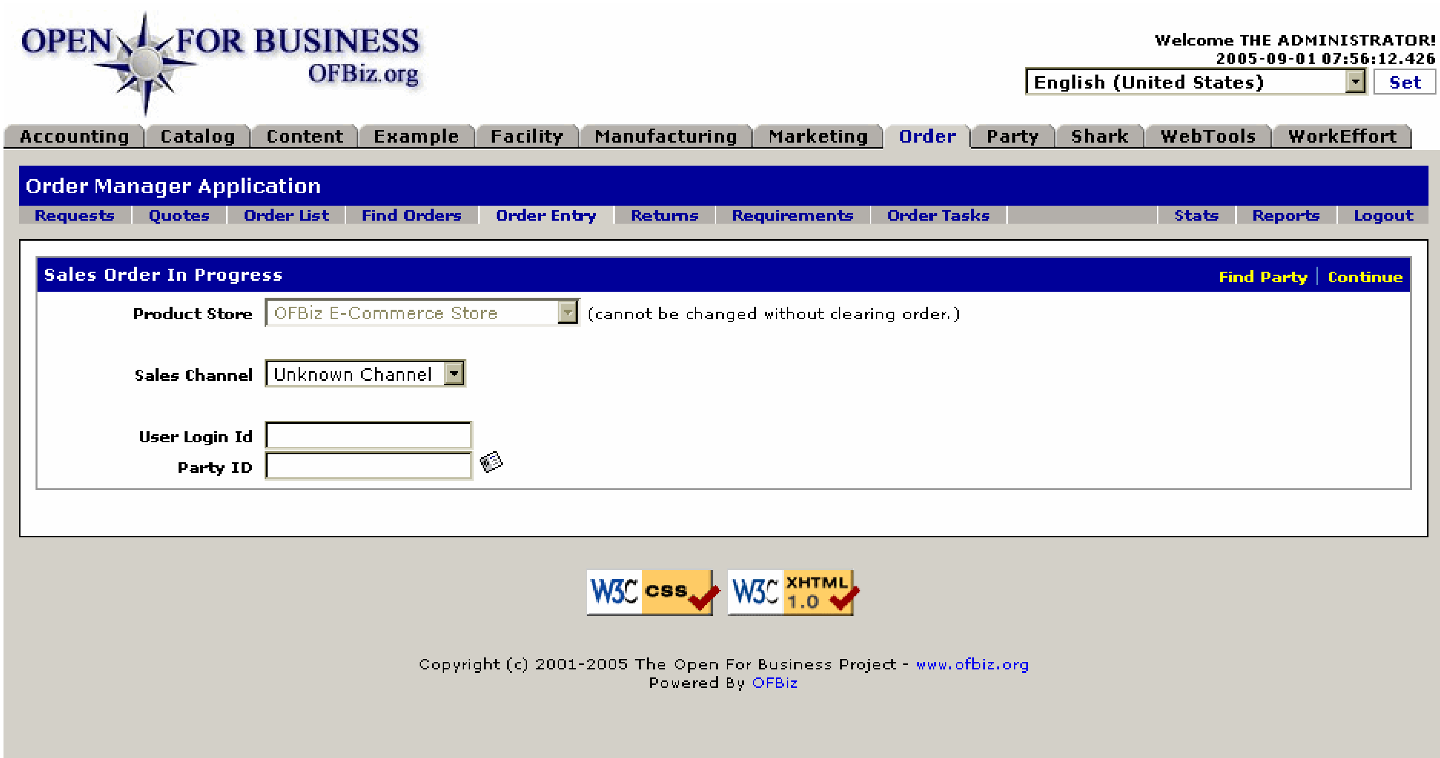
The [Find Party] link takes you out of the Sales Order entry process to the Party Manager Find Party screen.

.6.2.5.6 Create Customer

(Under development.)

.6.2.5.7 Change Party

id:[12821] image:



The [Change Party] screen gives you an opportunity to re-identify the ordering Party without losing entry data.

.6.2.5.8 Create New Product

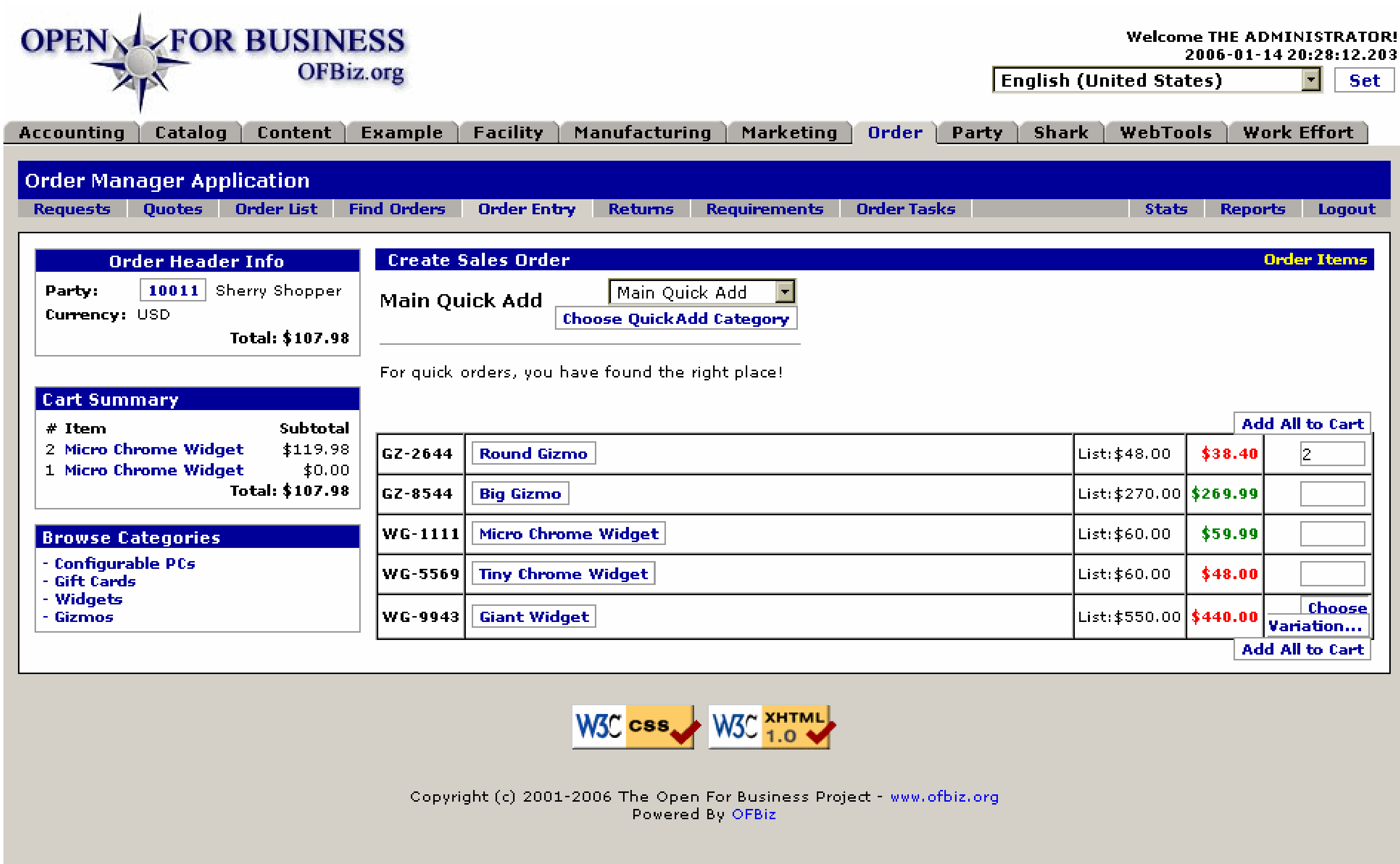
This link opens a new browser window in the Catalog Manager - Create Product screen. This would be useful if your customer wanted a product which you have on hand but had not yet entered into the system. You can 'create' the product for establishing it in the system without interrupting the sales order process.

.6.2.5.9 Quick Add

.6.2.5.9.1 Discussion

This feature dispenses with the promotions and other links, displays only those products listed in a small category, and streamlines the order entry process.<P> Created in the Catalog Manager, each small Quick Add catalog can focus on a unique category of products. These Quick Add categories are then used only here in the Sales Order process to focus the ordering process on the type of products which interest the buyer.

.6.2.5.9.2 quickadd



Quick Add items exist within Quick Add categories; select the category to display the product.

.6.2.5.9.3 link buttons

[Choose QuickAdd Category] [Choose Variation] [Add All to Cart] <B>[Order Items] </B>

.6.2.5.9.4 Choose Category (drop-down box)

The label is also the action button: click on it to bring up the Category chosen from the drop-down box.

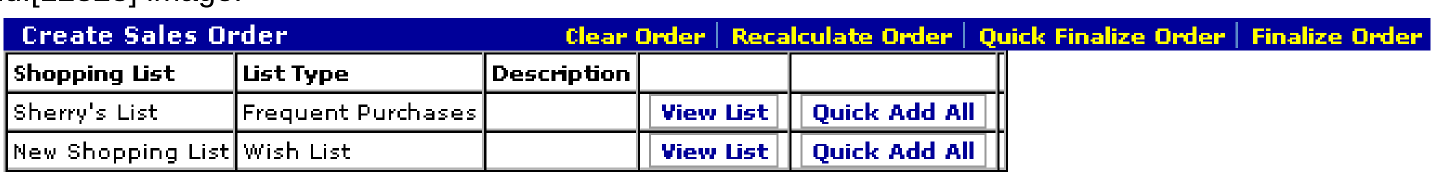
.6.2.5.9.5 Table of Products

The table has columns for each of the following:<B><P> Product ID
 Product name </B> Click name for product page. <B>
 List price
 Sales price
 Quantity desired </B>

.6.2.5.10 Shopping List

.6.2.5.10.1 shoppinglist-1

id:[12828] image:



All shopping lists for the customer are listed; select one by name.

.6.2.5.10.2 addFromShoppingList

id:[12829] image:

Create Sales Order | Clear Order | Recalculate Order | Quick Finalize Order | Finalize Order

Shopping List Id	Shopping List Item Seq Id	Product	Quantity	Reserv Start	Reserv Length	Reserv Persons	Quantity Purchased	
10000	00001	WG-1111 - Micro Widget - Chrome Colored	1		0	0		Add 1.0 to Order
10000	00002	GZ-5005 - The stylish gizmo	1		0	0		Add 1.0 to Order
10000	00003	GZ-9290 - A set of his/her gizmos	1		0	0		Add 1.0 to Order

Quick Add All

Return

Upon choosing a Shopping List [View], that List is shown in this table.

.6.2.5.10.3 Discussion

You can either select an item and click on the link [Add ... to Order], or click on [Quick Add All]. Your action is performed and you are returned to the full editOrder screen.

.6.2.6 <B>Choose Catalog</B> (drop-down box)

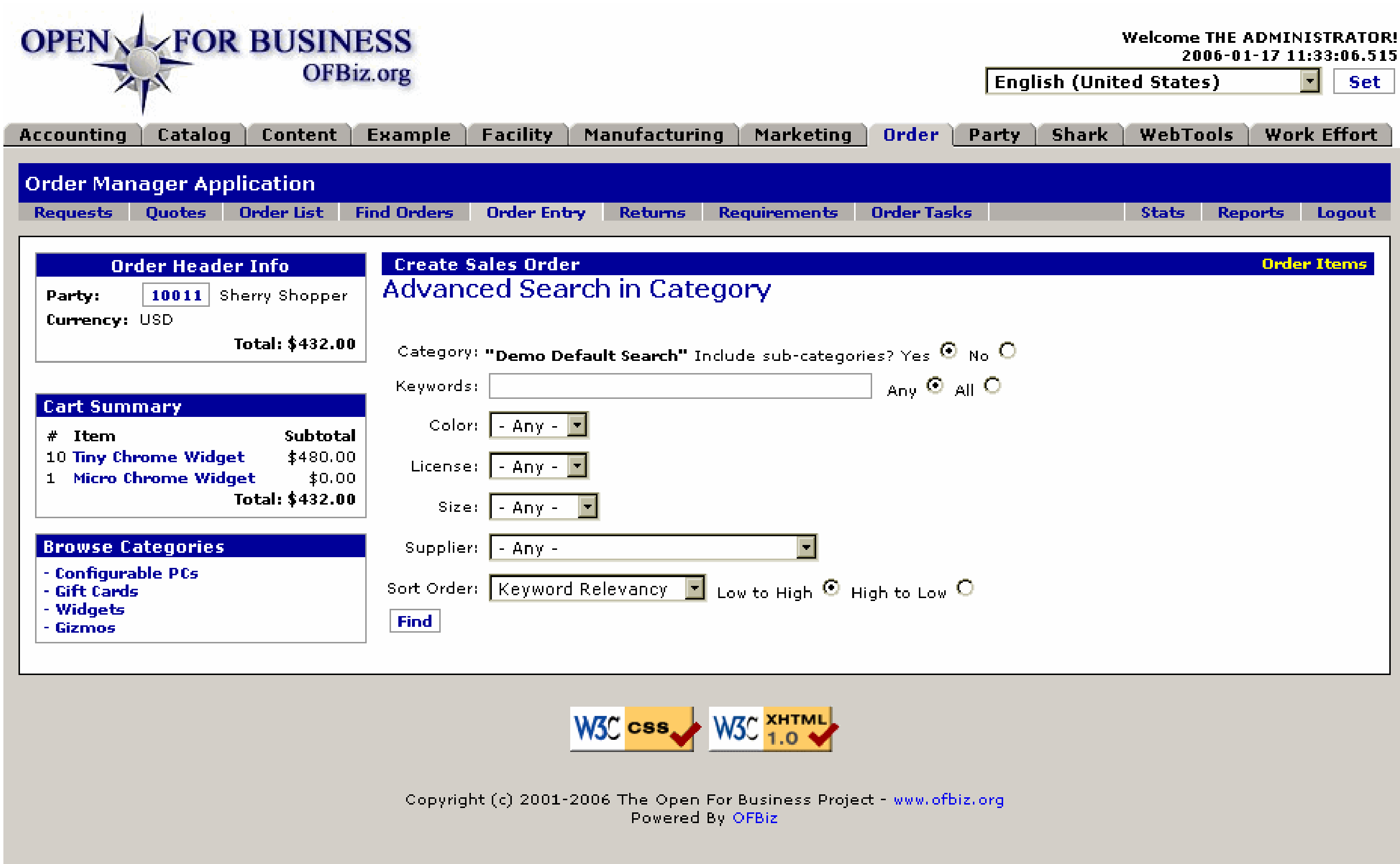
As the use of this screen is to take orders, quick access to the various catalogs is provided here with a drop-down box for selecting from among them.

.6.2.7 <B>Search Catalog</B>

.6.2.7.1 Quick Search or Advanced Search

Limited to items selected in the chosen Catalog, you can enter the Product ID or a keyword here for a quick search of the item. If you click on [Advanced Search], you will bring up the screen shown below.

.6.2.7.2 SO-advancedsearch



While still within the Sales Order Entry process, you can help the customer find items using these advanced search options.

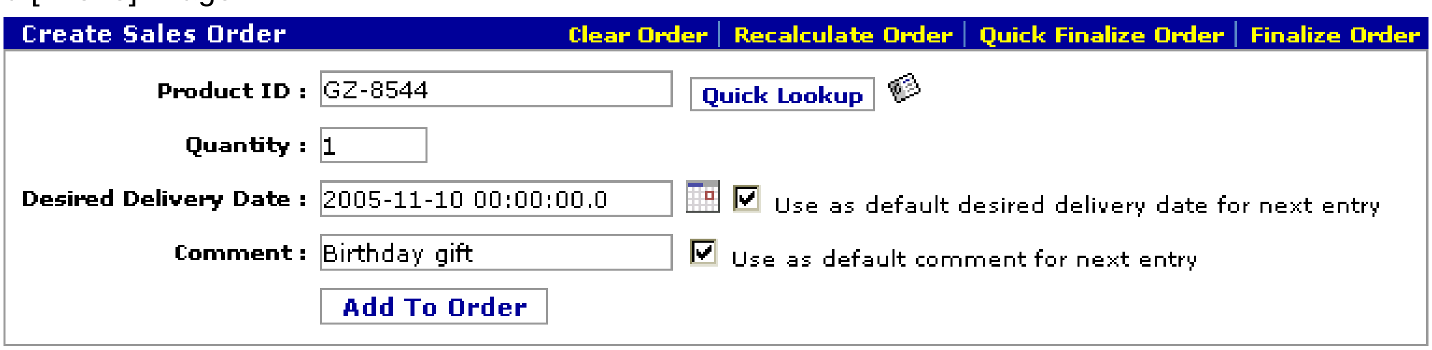
.6.2.8 <B>Browse Categories</B>

Existing product categories are listed here; click on a preferred one and products contained therein will be displayed. <P> Click on the link [Order Items] to return to the primary Order Entry screen.

.6.2.9 <B>Create Sales Order </B>

.6.2.9.1 CreateSalesOrder

id:[12843] image:



This section, where items are selected and added, is the heart of the ordering process.

.6.2.9.2 link buttons

[Add To Order] [Quick Lookup] <B>[Clear Order] [Recalculate Order] [Finalize Order] </B>

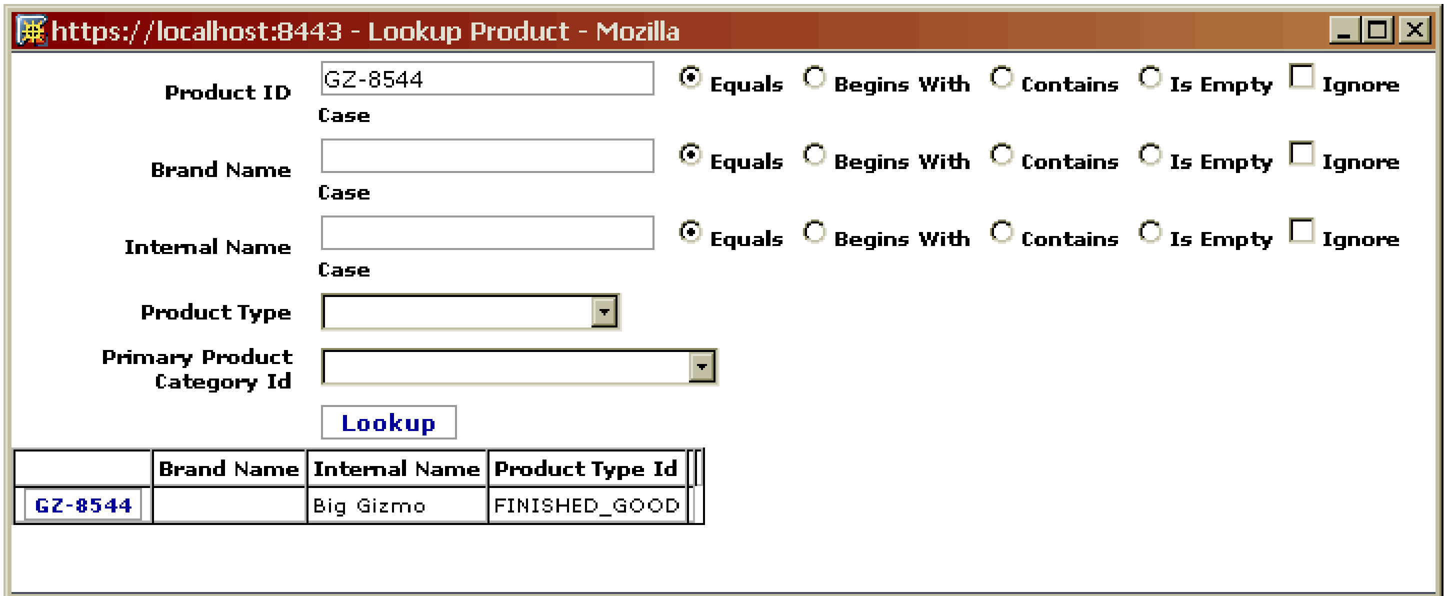
.6.2.9.3 Product ID (popup)

If you click on the popup search button, a powerful screen appears which will help you find any product through a variety of approaches. Once a product is chosen, it will automatically populate here and the popup will disappear.

.6.2.9.4 Quick Lookup

.6.2.9.4.1 Quick Lookup

id:[13503] image:



After Product ID is entered, Quick Lookup brings up this link to view product details.

.6.2.9.4.2 link buttons

[Lookup]

.6.2.9.4.3 Discussion

After a Product ID has been entered in the Order Entry, you can select Quick Lookup to bring up this screen. Here you see the Product ID already populated (if it was accurately entered) along with some information about the product. The form can then be used to locate other products.

.6.2.9.5 Quantity

How many does the customer want? Automatically defaults to 1.

.6.2.9.6 Desired Delivery Date (popup calendar)

Popup calendar facilitates date entry.
 With the checkbox to 'Use as default desired delivery date for next entry,' you can save having to re-enter this information with each item. Should a subsequent item need a different delivery date, this selection can be overridden at that time.

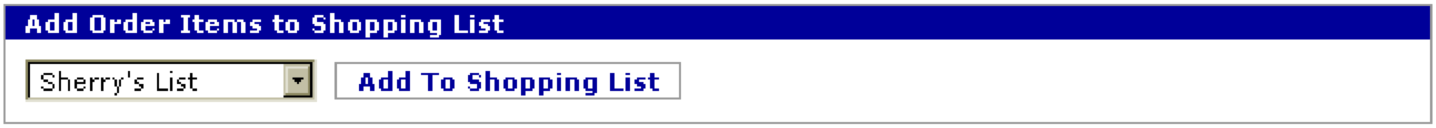
.6.2.9.7 Comment

With the checkbox to 'Use as default comment for next entry,' you can save having to re-enter this information with each item. Should a subsequent item need a different comment, this selection can be overridden at that time.

.6.2.10 <B>Add Order Items to Shopping List </B>

.6.2.10.1 AddToList

id:[12847] image:



Choose a shopping list from the drop-down box, then click the [Add To Shopping List] link.

.6.2.10.2 link buttons

[Add To Shopping List]

.6.2.10.3 Discussion

If the customer indicates a desire to regularly re-order this item, select one of their Shopping Lists and click on the link [Add to Shopping List]. When they re-order you will be able to quickly enter the item when you ask them, <I>And which shopping list will you be ordering from today?</I>

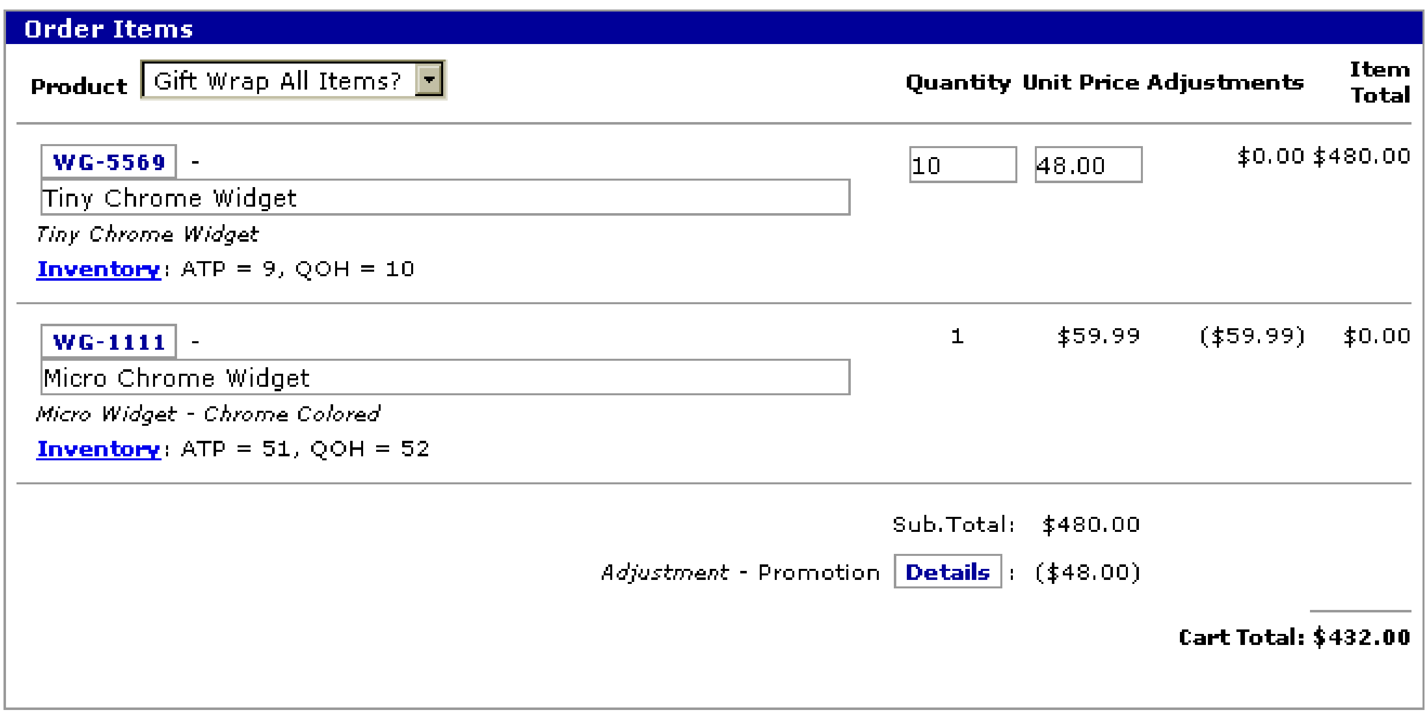
.6.2.11 <B>Order Items</B>

.6.2.11.1 Discussion

Nothing is shown here until after a first item has been added to the order. Then the details are presented as shown below. Note that free promotional add-ons are also included whenever the customer has entered certain items or reached a purchase level that qualifies them.

.6.2.11.2 OrderItemsEntered

id:[12836] image:



Ordered items may also have quantities changed or unit prices adjusted.

.6.2.11.3 link buttons

[Select:...] [Details] [Inventory]

.6.2.11.4 Product

Shown are the Product ID, the product name, and the description. Click on Product ID for more product details.<p> Note that Desired Delivery Date for the item and any Comments are printed out on a line underneath the Product information.

.6.2.11.5 Gift Wrap option (drop-down box)

Options pre-set to 'Gift wrap all items?' or 'No gift wrap.'

.6.2.11.6 Comment

This is to capture comments made by ordering parties such as 'This is an anniversary gift!' By carrying such comments through the order fulfillment process, mistakes can be avoided.

.6.2.11.7 Desired Delivery date

This was selected during the item entry process. It may vary with each item or be maintained for all items. If the desired delivery date is unrealistic because of inventory or shipping difficulties, be sure to alert the customer.

.6.2.11.8 Inventory

.6.2.11.8.1 orderitemInventory

id:[13494] image:

This screen under the Catalog Manager > Main > Inventory screen for the selected product shows full inventory details.

.6.2.11.8.2 Discussion

On the Order screen, shows the ATP/QOH for this item immediately, allowing the order taker to determine delivery availability. Click on the [Inventory] link to see the screen shown above, then use the browser back-button to return to the order screen.<p> From this Inventory screen you can make adjustments to Inventory, locate additional Inventory, and see quickly what it will take to get the items for your customer.

.6.2.11.9 Quantity

Note that the quantity for ordered items can be adjusted within this frame. This acccomodates the customer that suddenly decides to double an order, for example.<P> Quantity of the promotional items added by the system is indicated, but cannot be changed. If the customer prefers NOT to receive any of the Promo items, they can be removed later in the order approval process.

.6.2.11.10 Unit Price

Note how this price can be modified here. This will accommodate changes to fulfill Quotes or to make adjustments agreed upon elsewhere. Promotional items cannot be adjusted.

.6.2.11.11 Adjustments

These are calculated by the system based upon price rules, promotions and other considerations. Reductions in price are placed inside parentheses ( ).

.6.2.11.12 Item Total

Essentially the result of Quantity times Unit Price minus Adjustments.

.6.2.11.13 Summary section

.6.2.11.13.1 Sub Total

Sum of the costs before adjustments, taxes or shipping.

.6.2.11.13.2 Adjustments

Click on [Details] to obtain details about the Adjustments.

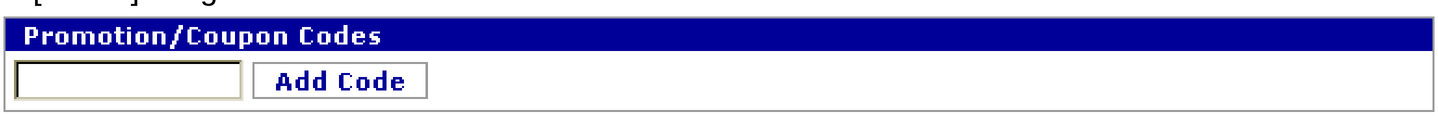
.6.2.11.13.3 Cart Total

The sum of the sub-totals plus adjustments. This still does not include shipping or taxes which are calculated in later.

.6.2.12 <B>Promotion/Coupon Codes</B>

.6.2.12.1 PromoCodes

id:[12850] image:



Promo codes from advertising campaigns can be entered here to obtain discounts.

.6.2.12.2 link buttons

[Add Code]

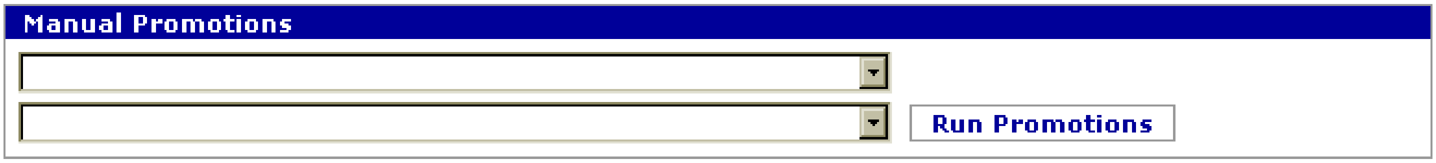
.6.2.12.3 Code entry box

When a promotional offer is made outside of the system, in a print flyer, journal, or an email solicitation, for example, this is where the Code is entered to qualify the customer for the promotion.<P> Promotion Codes enable tracking of the results of promotional efforts and can confirm the effectiveness of advertising money spent to bring customers to this point.

.6.2.13 <B>Manual Promotions</B>

.6.2.13.1 manualPromotions

id:[14104] image:



Use the drop-down box to bring up other Promotions to apply to this order.

.6.2.13.2 link buttons

[Run Promotions]

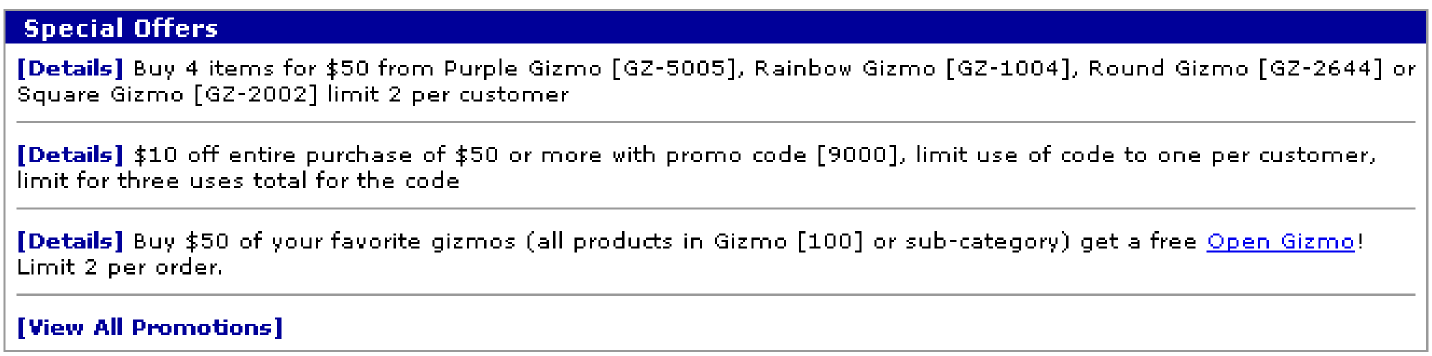
.6.2.13.3 Discussion

Choose one or two existing Promotions from the drop-down box(es), then click on [Run Promotions]. The terms of the Promotion will be applied to the Sales Order.

.6.2.14 <B>Special Offers</B>

.6.2.14.1 SpecialOffers

id:[12852] image:



Presents a synopsis of Special Offers; click [Details] for details.

.6.2.14.2 link buttons

[Details] [View All Promotions]

.6.2.15 <B>You might also be interested in:</B>

.6.2.15.1 YouMightAlso

Promos with squibs to encourage impulse purchases. Click name for details.

.6.2.15.2 link buttons

[Add to Cart]

.6.2.15.3 Item squib

A graphic can be given with the text to help identify the item. This is most useful in the ecommerce portion of the application, but the same product description is presented here with the squib.

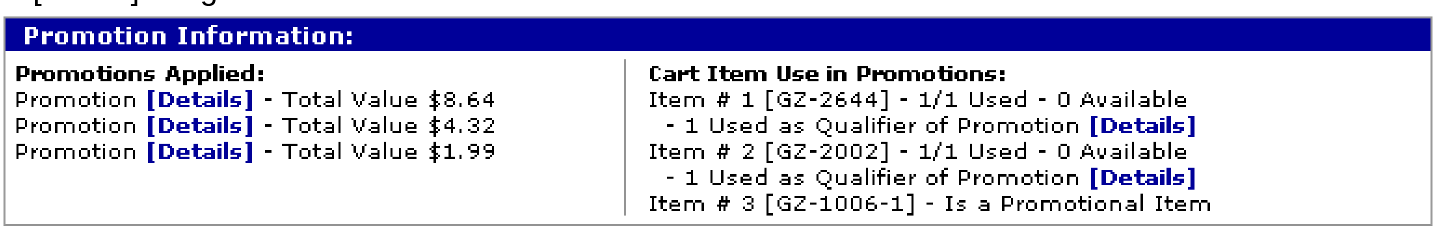
.6.2.15.4 Quantity

Customers are encouraged to ask for more than one of the promoted items by entering a quantity for this purchase.

.6.2.16 <B>Promotion Information</B>

.6.2.16.1 PromoInfo

id:[12856] image:



This information is specific to ordered items, listed by Item #.

.6.2.16.2 link buttons

[Details]

.6.2.16.3 Promotions Applied

Every Promotion that was applied to this order is listed with a link to more information about the promotion. Click on [Details] to obtain more specifics. The value of each Promotion item is given in this section.

.6.2.16.4 Cart Item Use in Promotions

Listed by Item number, each of the promotion items either qualifying for a discount or being given as a promo item are given. For explanations of the qualifying purchase, click on [Details].

.6.3 Recalculate Order

Before moving to Finalize the order, you should probably click once upon the Recalculate Order link to bring in any final adjustments needed, allowing the system to consider minor changes you might have made.

.6.4 Quick Finalize Order

.6.4.1 QuickCheckout

Process sections 1 - 2 - 3, and you have accomplished the steps from several normal screens at one place.

.6.4.2 link buttons

[New Address] [Split Into Multiple Shipments] [Update] [Credit Card] [EFT Account] [Split Payment] [Profile] [Back to Shopping Cart] [Continue to Final Order Review]

.6.4.3 Discussion

You have a choice. You may process with the normal sequence of Order Entry screens, or you may consolidate several of the steps here into the Quick Finalize Order. <P> As soon as the shipping address (or addresses for a split shipment) have been confirmed, shipping costs will appear in section 2. <P> Select the appropriate radio button to assign the shipping method. Complete the remaining information in this central section, then move on to section 3. <P> Payment options include bringing up a previously-established method (credit card, EFT, or Gift Card), paying with one of the radio button methods, or introducing new payment vehicles as shown. Choose or update as needed and, when ready, click on the bottom link [Continue to Final Order Review].

.6.4.4 (1) Where shall we ship it?

.6.4.4.1 Add new address

Brings up the screen to 'Create New Shipping Address' which is added to the ordering Party's contacts.

.6.4.4.2 Link: Split Into Multiple Shipments

Not currently operating. Will allow the shipment to be divided into multiple recipient addresses.

.6.4.4.3 Select Shipment Address

Each address currently associated with the ordering Party as a Destination Address appears with a radio button. Click on the associated radio button to assign the shipping address. If the desired address is not there (for the purpose of a gift recipient, perhaps), use the Add New Address link above to create the new address. Alternatively, you can go to the Party Manager and create the new address there.

.6.4.5 (2) How shall we ship it?

.6.4.5.1 Select a carrier

Use the radio button associated with the desired shipping method to select. Shipping costs will populate as soon as the destination address has been confirmed.

.6.4.5.2 <I>Ship all at once, or ...</I>

Be sure the customer understands the ramification of either of the two choices:<P> (1) <I>Please wait until ... </I> means that if any item in the order is not available for shipment (and you as the order taker can reasonably determine that probability from the ATP/QOH numbers), the shipment will be held up until everything is ready to go.
 (2) <I>... as they become available ...</I> will release the shipment with whatever items are currently in stock. Back orders will be sent in a separate shipment; this will increase the shipping costs.

.6.4.5.3 Special Instructions

Enter any special shipping instructions here. For example, maybe the package should be left on the porch even if no one can sign for it. Or, if multiple recipients at the same address, instructions to pack each item in a separate package.

.6.4.5.4 PO Number

If the customer ordered by Purchase Order, enter their PO number here.

.6.4.5.5 <I>Is This a Gift? </I>

Select Yes or No with the radio button. This signals whether to include the following Gift Message and whether to gift wrap the item.

.6.4.5.6 Gift Message

Enter the text desired by the ordering party to accompany this gift to the recipient. You might need to suggest contents to the customer, but be sure they agree with whatever will be entered here.

.6.4.5.7 Email Addresses

This will populate with the default email address for the ordering party. They might want to alert the recipient or others that an order is coming. <P> For example, if a company is sending out items to several of their subsidiaries or salemen, they could each be notified by this messaging method. Or, perhaps a notice needs to go to the recipient with the Purchasing Department being the original Party involved.

.6.4.6 (3) How shall you pay?

.6.4.6.1 Add:

Use the links to add a Credit Card or EFT Account to the payment options.

.6.4.6.2 Link - Split Payment

When this option is completed, you will be able to divide the cost of the order among two or more parties. Click on the link to see if has been implemented yet.

.6.4.6.3 Payment options

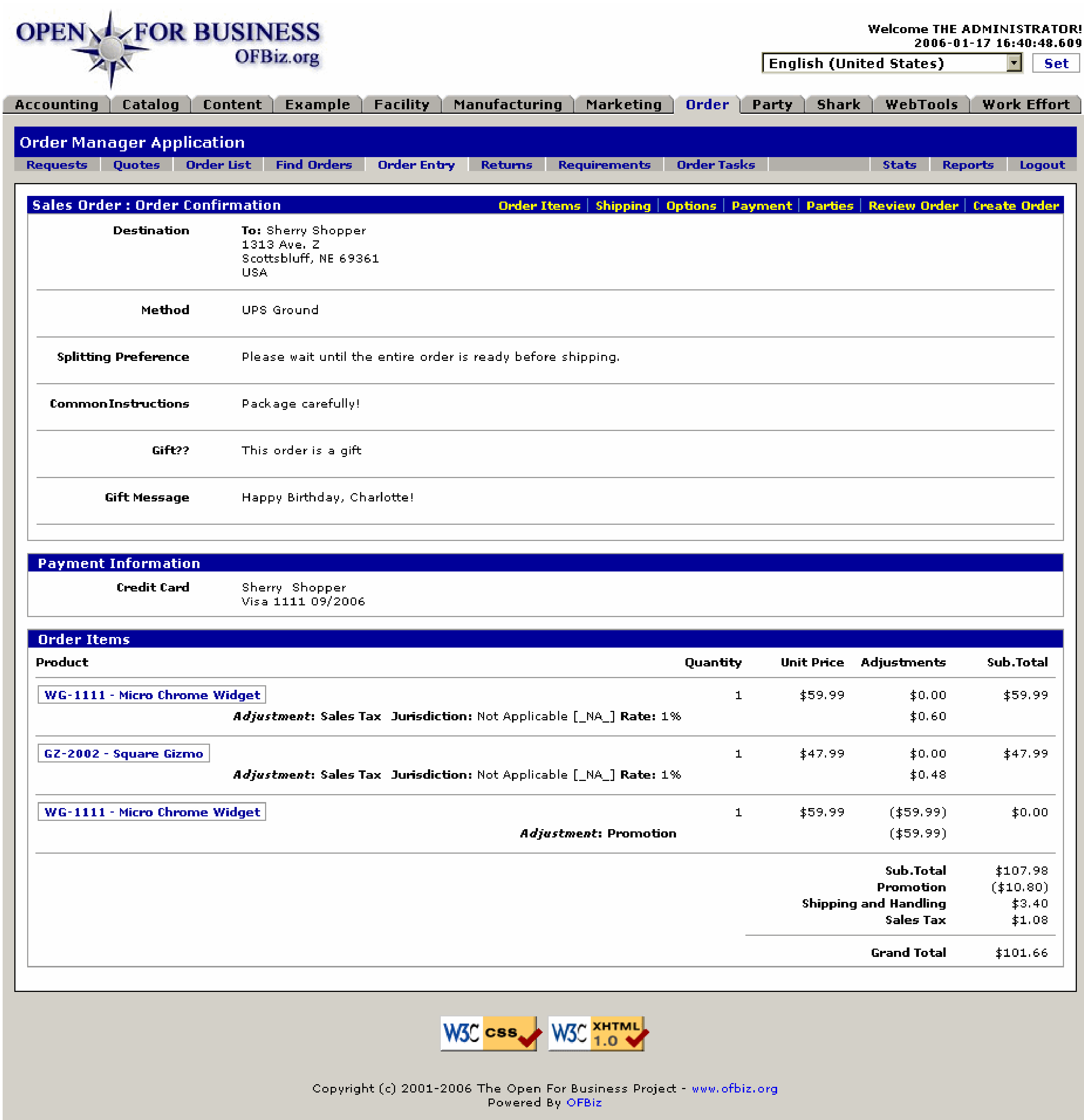
Some of the options will appear for any ordering party; others are presented only when they exist, such as Gift Card accounts, EFT accounts, Credit Cards, etc. Use the radio button to indicate which way this customer will be paying. <P> An [Update] link is provided for some accounts in case an account needs information changed, such as expiration dates or billing addresses. <P> If this is to be charged to a Gift Card not associated with the Party, click on the box and enter the details.

.6.4.7 Continue with the order

.6.4.7.1 Continue to Final Order Review link

Click on this link in the lower RH corner when you have completed all sections of this screen. You are taken to the Review screen, shown below, where you can confirm every aspect of the order before finalizing it with the customer.

.6.4.7.2 checkout



When you click on [Continue to Final Order Review], this gives an overview. If OK, click on [Create Order] to proceed.

.6.4.7.3 link buttons

<B> [Order Items] [Shipping] [Options] [Payment] [Partries] [Review Order] [Create Order] </B>

.6.4.7.4 Discussion

When you review the order, if you find any area needing changes, click on the link to take you to that part of the order entry process. For example, if you had selected to use the credit card but the customer decided to use a gift card instead, click on [Payment] to return to that screen and make changes. <P> Once everything is reviewed with the customer and all is correct, click on [Create Order] to proceed.

.6.5 Finalize Order

If you have just completed the Quick Finalize Order process, you can skip then next few steps. Proceed to <I>Continue final Order Confirmation</I>, below.<P> If you did NOT use the Quick Finalize Order process, start here. This is where you confirm the Order Entry Ship-To Settings. If this is a Gift Order, be sure to request the new Ship To address. Use the [Create New] link to bring up the address fields.<p>After clicking on a radio button to confirm or entering the ship-to information, select [Continue] for the next screen. [Order Items] returns you to the Order Entry screen.

.6.5.1 finalizeOrder-Sales

id:[DOCORD517] image:

Confirm the Ship-To Address here. When a Party has multiple address on file, select the desired destination or add another.

.6.5.2 link buttons

[Create New] [Update] <B>[Order Items] [Shipping] [Continue] </B>

.6.5.3 Select a Shipping Address

Probably a good idea to read back the information in the address to confirm its accuracy with the customer. <P> (1) If the customer wants to ship to someone already associated with her in the Party Manager, that address can be selected with a radio button.
 (2) If she wants to ship to someone not at all in the system, click on [Create New] to add another address to her file.
 (3) If she wants to ship to another Party with its own identity in the system, use the lower portion of this form to Ship to Another Party.

.6.5.4 Ship to Another Party

Use the popup search tool to locate the other party. That party's Ship-to address will then be used for this order.

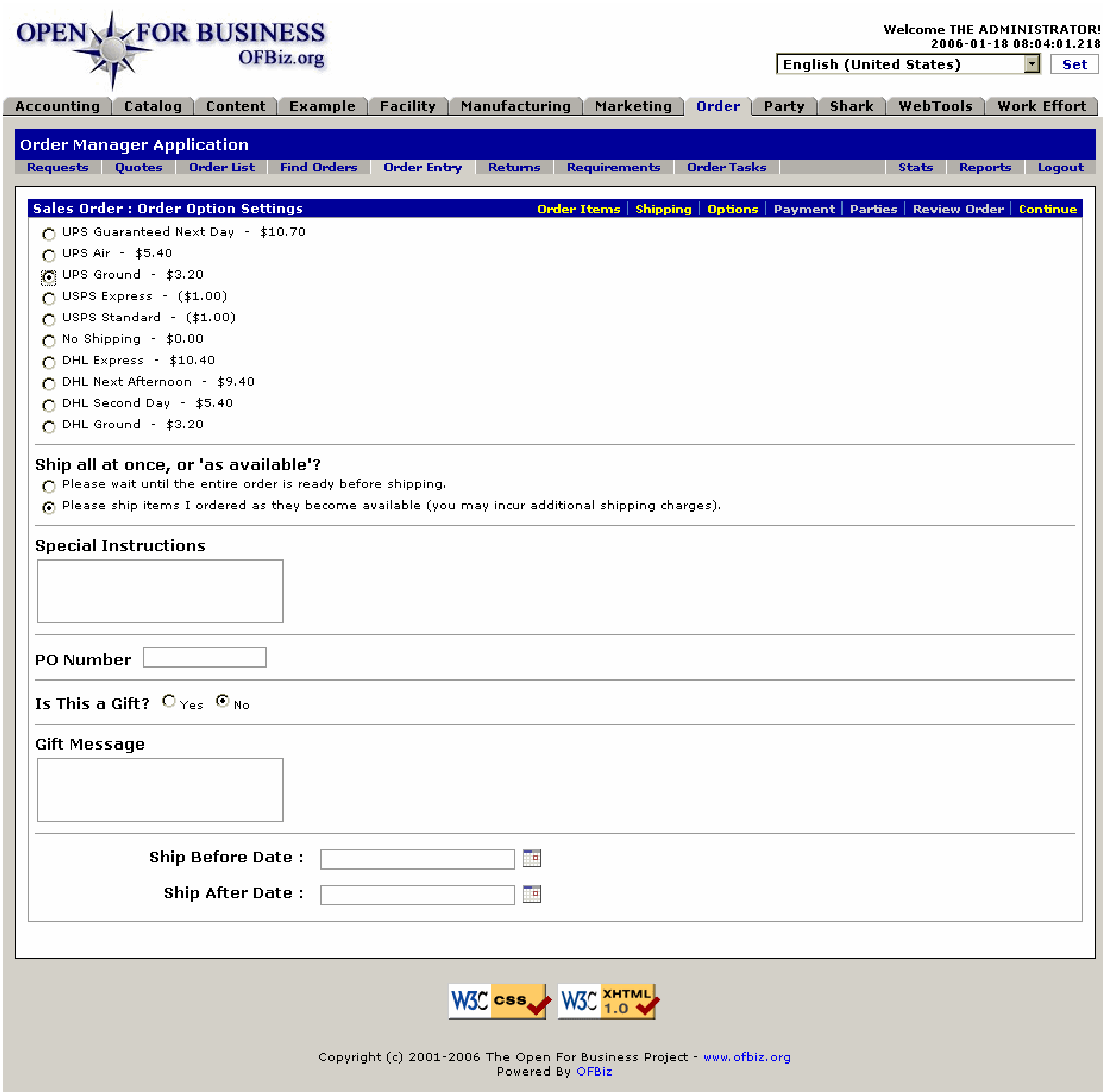
.6.5.5 Continue

When satisfied with the ship-to address, click on the [Continue] link.

.6.6 Continue with Order Option Settings

[Shipping] returns you to the preceding Shipping Address confirmation screen. [Items] returns you to the earlier Order Entry screen.

.6.6.1 finalizeOrder-Sales2



This part of the Order Entry process confirms the shipping instructions and specifies the shipping carrier and rate desired.

.6.6.2 link buttons

<B>[Order Items] [Shipping] [Options] [Continue]</B>

.6.6.3 Shipping methods (Radio buttons)

Shipping options given here provide choices in method and cost. <p>NOTE: You must select at least one Radio Button in any section with buttons.

.6.6.4 Partial shipment choice (Radio buttons)

'Ship all at once or as available?' You must select one of the buttons. The choice is between waiting for everything to be in hand before shipping, or to break the shipment into parts as items become available.

.6.6.4.1 'wait ... entire ...'

Make this selection when customer wants the total order to arrive in one shipment. If any single item is temporarily unavailable, the shipment will be held up until it can all be fulfilled.

.6.6.4.2 'as ... available'

This means that if an item is temporarily out of stock, ship all that is presently available, then ship out the remaining items as they become available.

.6.6.5 Special Instructions

Enter any special shipping instructions here. For example, maybe the package should be left on the porch even if no one can sign for it. Or, if multiple recipients at the same address, instructions to pack each item in a separate package.

.6.6.6 PO Number

This should NOT be populated or entered for a Sales Order unless a Purchase Order was received from an existing company.

.6.6.7 <I>Is This is Gift?</I> (Radio buttons) (Y/N)

Select Yes or No with the radio button. This signals whether to include the following Gift Message and whether to gift wrap the item.

.6.6.8 Gift Message

Enter the text desired by the ordering party to accompany this gift to the recipient. You might need to suggest contents to the customer, but be sure they agree with whatever will be entered here.

.6.6.9 Ship Before or After dates

Using the popup calendars, select specified shipping dates where needed. For example, if the customer wants to wait for a special event, or if shipment must take place before an anticipated rate increase, use these fields to signal that information.

.6.7 Continue with Order Entry Payment Settings

.6.7.1 Continue with Order Entry Payment Settings

Must select one button before you can continue.

.6.7.2 finalizeOrder-Sales3

Presentation depends upon methods established for the Party. Payment method confirmed here before continuing in the process.

.6.7.3 link buttons

[Create New] [Update] <B>[Order Items] [Shipping] [Options] [Payment] [Continue] </B>

.6.7.4 Link buttons discussed

(1) [Create New] takes you to a screen where you choose what type of payment method you want to create new, for example a new credit card or a new EFT payment account. Select that and you are presented with a screen for completing the information for adding a new payment method to the Party.<P> (2) [Update] opens a new browser in the Party Manager where you can make changes to the existing Credit Card, such as an expiration date or name on the card, etc.

.6.7.5 Order Entry Payment Settings

Select one of the Radio Buttons below before proceeding with the Order Confirmation process. The buttons will reflect payment methods already established by the Customer. If no acceptable method is indicated, click on the [Create New] link; screens for capturing EFT or Credit Card information will be presented for completion.

.6.7.5.1 Payment already received

If the order was prepaid, this indication should be here.

.6.7.5.2 Offline: Check/Money Order

Generally means the Party has paid or will be billed with payment expected to come in the form of a check or money order.

.6.7.5.3 CC: (type/number)

Refers to Credit Card, and presents the information already available in the Party Manager for the person placing the order. If this is the desired method of payment, click on the Radio Button.

.6.7.5.4 EFT: (institution/account number)

Refers to Electronic Funds Transfer from an existing financial account, and presents the information already available in the Party Manager for the person placing the order. If this is the desired method of payment, click on the Radio Button.

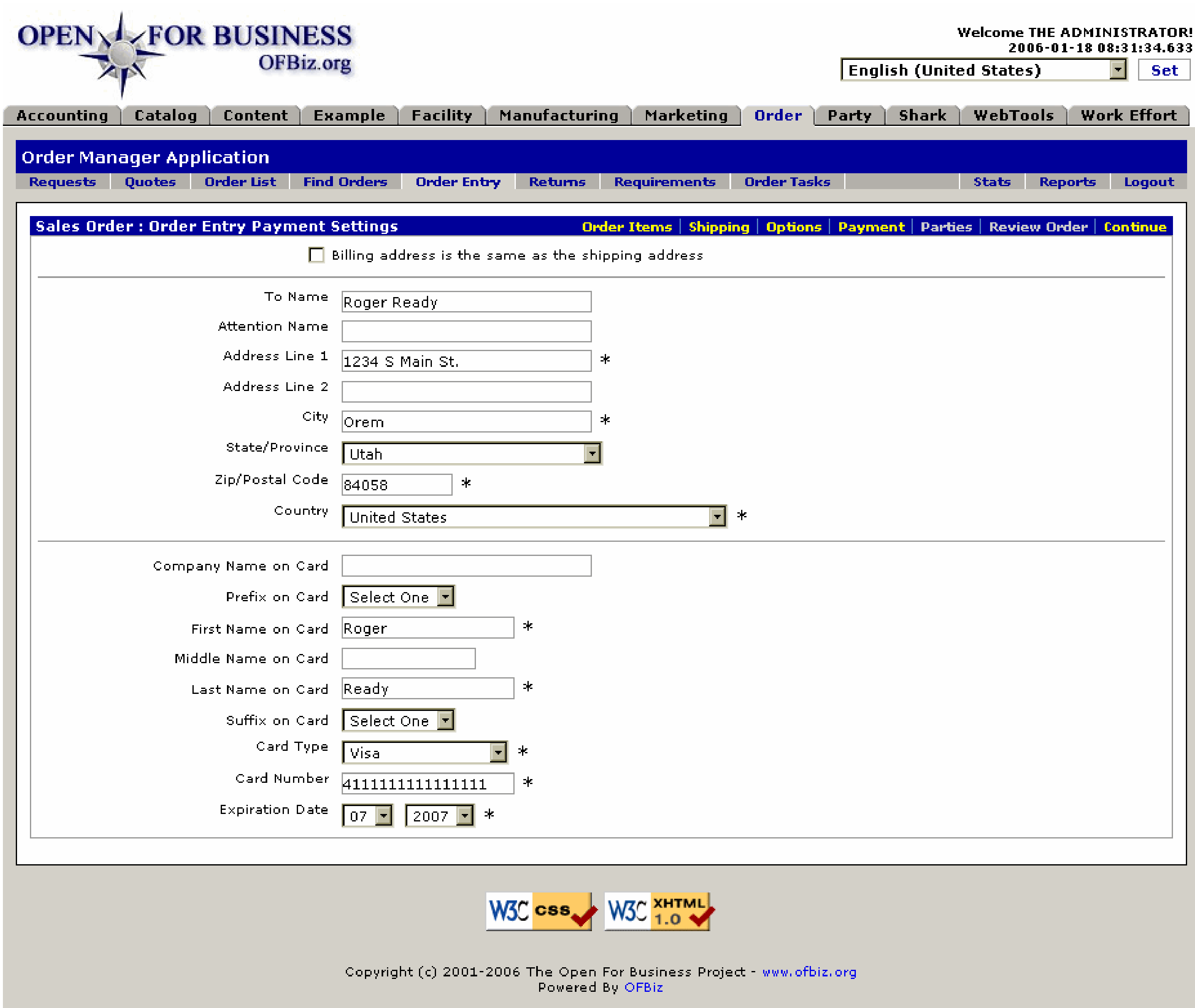
.6.7.5.5 Gift Card or other means

Here could also be reference to an existing Gift Card, a Christmas Club savings account, or other means of funding the purchase. Whatever has been established within the Party Manager for this Party will be presented; use the radio button to select the preferred method.

.6.7.6 Create new payment method

.6.7.6.1 finalizeOrder-Sales3a

id:[14068] image:



If you select a payment method not in the Party's records, a working screen for data entry appears.

.6.7.6.2 Discussion

This screen will vary depending upon what payment method was selected in the previous screen. If you selected Credit Card and your card was already in the system, the screen would only have you confirm the information.<P> In this instance as shown, the customer selected Credit Card but his information had not yet been entered.

Therefore, this working screen is provided with which you can enter his information.

.6.8 Association Confirmation

.6.8.1 setAdditionalParty

id:[11091] image:

If another Party is to be associated with this order, identify them in the process that starts with a button from this screen.

.6.8.2 link buttons

<B> [Order Items] [Shipping] [Options] [Payment] [Parties] [Continue]</B>

.6.8.3 Discussion

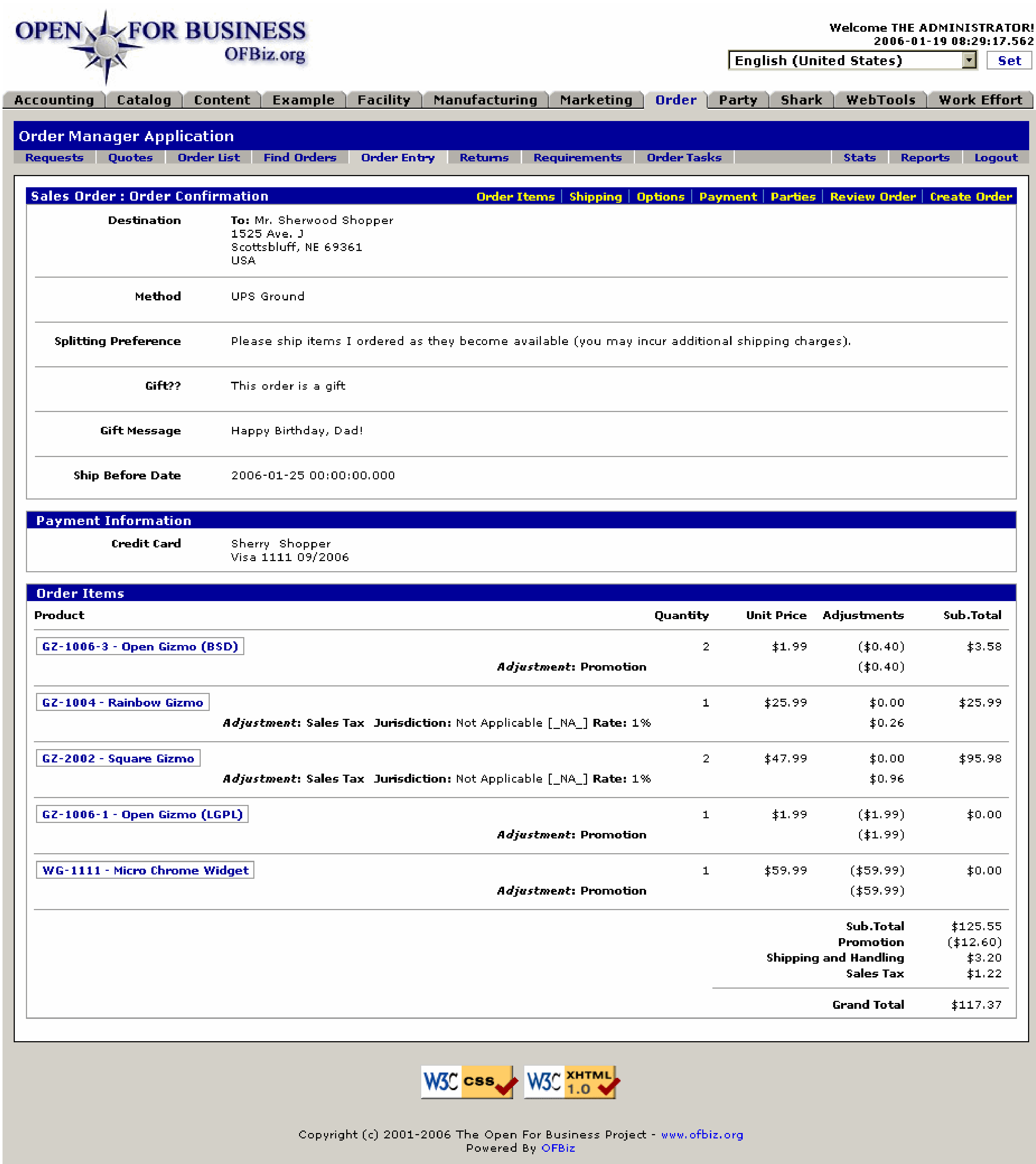
If the ordering party wishes to involve another party in this order for whatever reason, this is the screen where you begin that process. Select a radio button for Party or Party Group, then click on [Continue]. <P> The default for almost every order will be to not add additional parties. Leave the default (bottom) button selected, press [Continue] and go on to the next screen.<P> If another Party or Group is to be brought in, the screens making that possible are very simple and self explanatory.

.6.9 Continue final Order Confirmation

.6.9.1 Discussion

This brings all the details together for one last confirmation before committing the order. If anything needs to be changed, click on the appropriate link button across the top to return to that part of the order process. <p> You will come to this screen whether you processed the normal method or used the Quick Finalize Order link.
Everything OK? Then click on [Create Order] to proceed. <B>Do <U>not</U> click on [Create Order] until everything here is confirmed.</B>

.6.9.2 finalizeOrder-Sales4



This is the final confirmation screen for the Sales Order Entry process, whether using Quick Finalize Order or the normal process.

.6.9.3 link buttons

<B>[Order Items] [Shipping] [Options] [Payment] [Parties] [Review Order] [Create Order]</B>

.6.9.4 Sales Order: Order Confirmation

Destination, shipping methods and other details of the process are given here. Each presentation depends upon the details of the order. You will likely find information about
 Destination (person and address)
 Method (carrier and whether express or normal)
 Splitting Preference (ship available or wait for all)
 Added Instructions
 Gift? and message
 Shipping before/after dates.

.6.9.5 Payment Information

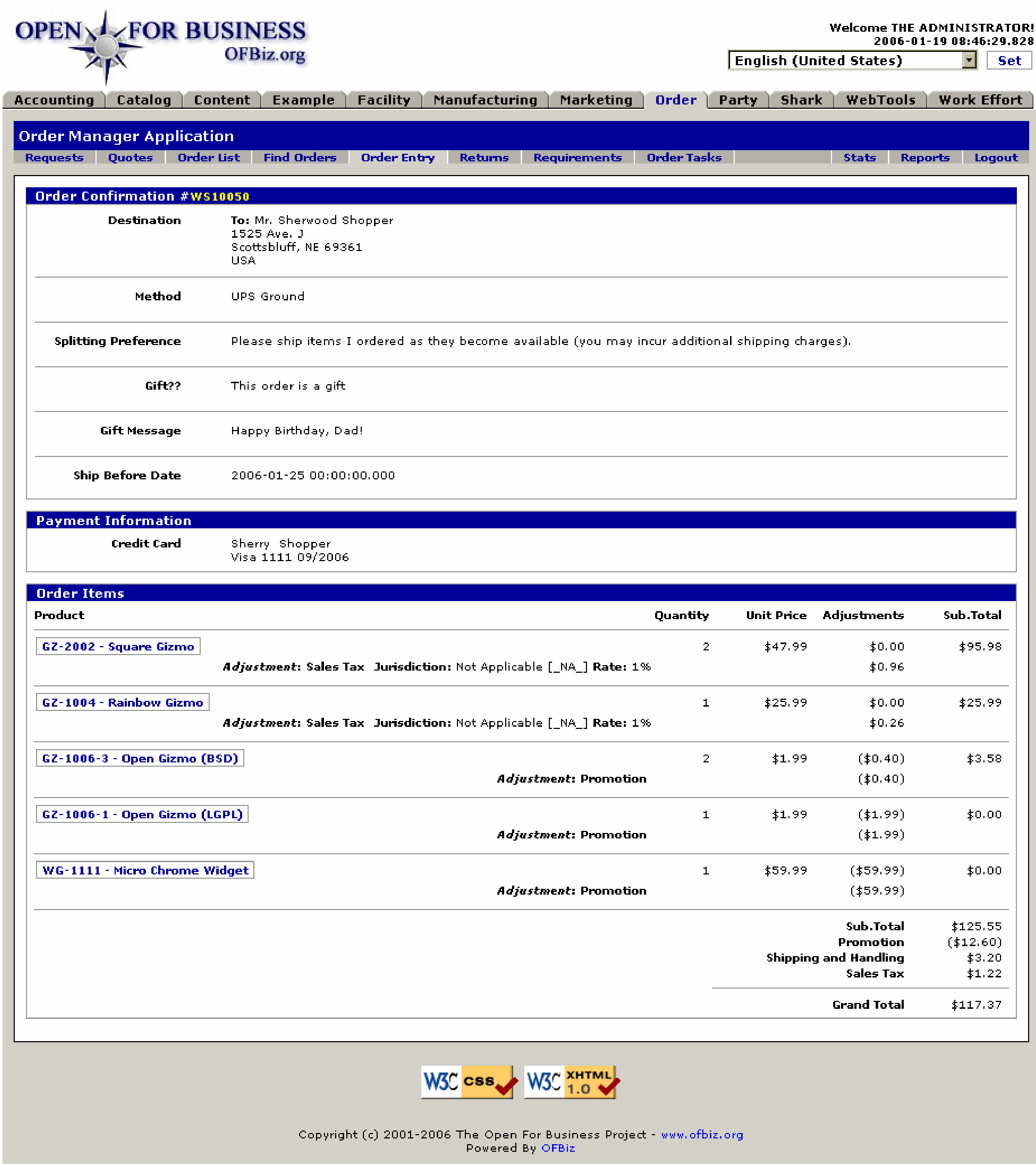
Presentation will vary; display depends upon the selected payment method.

.6.9.6 Order Items

Here is the content of the Order itself. Click on the Order Items link to go back and make changes if needed. Return to this screen by clicking on the Finalize Order link from there. <P> You can see that there are columns for the following information:
 Product
 Quantity
 Unit Price
 Adjustments
 Sub.Total <p> Then there is the financial section where the sub-totals are brought together, adjustments made, taxes applied, and shipping/handling charges added before the final total is stated.

.6.10 Create Order to Process the Order

.6.10.1 processorder-Sales



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Welcome THE ADMINISTRATOR!
2006-01-19 08:46:29.828
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

Order Confirmation #WS10050

Destination	To: Mr. Sherwood Shopper 1525 Ave. J Scottsbluff, NE 69361 USA
Method	UPS Ground
Splitting Preference	Please ship items I ordered as they become available (you may incur additional shipping charges).
Gift??	This order is a gift
Gift Message	Happy Birthday, Dad!
Ship Before Date	2006-01-25 00:00:00.000

Payment Information

Credit Card	Sherry Shopper Visa 1111 09/2006

Order Items

Product	Quantity	Unit Price	Adjustments	Sub.Total
GZ-2002 - Square Gizmo	2	$47.99	$0.00	$95.98
Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 1%			$0.96	
GZ-1004 - Rainbow Gizmo	1	$25.99	$0.00	$25.99
Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 1%			$0.26	
GZ-1006-3 - Open Gizmo (BSD)	2	$1.99	($0.40)	$3.58
Adjustment: Promotion			($0.40)	
GZ-1006-1 - Open Gizmo (LGPL)	1	$1.99	($1.99)	$0.00
Adjustment: Promotion			($1.99)	
WG-1111 - Micro Chrome Widget	1	$59.99	($59.99)	$0.00
Adjustment: Promotion			($59.99)	
			Sub.Total	$125.55
			Promotion	($12.60)
			Shipping and Handling	$3.20
			Sales Tax	$1.22
			Grand Total	$117.37

W3C CSS W3C XHTML 1.0

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Note the absence of link buttons; the highlighted Order Confirmation #(WS10050) needs to be clicked before you can proceed.

.6.10.2 link buttons

- No links except the Order Confirmation Number -

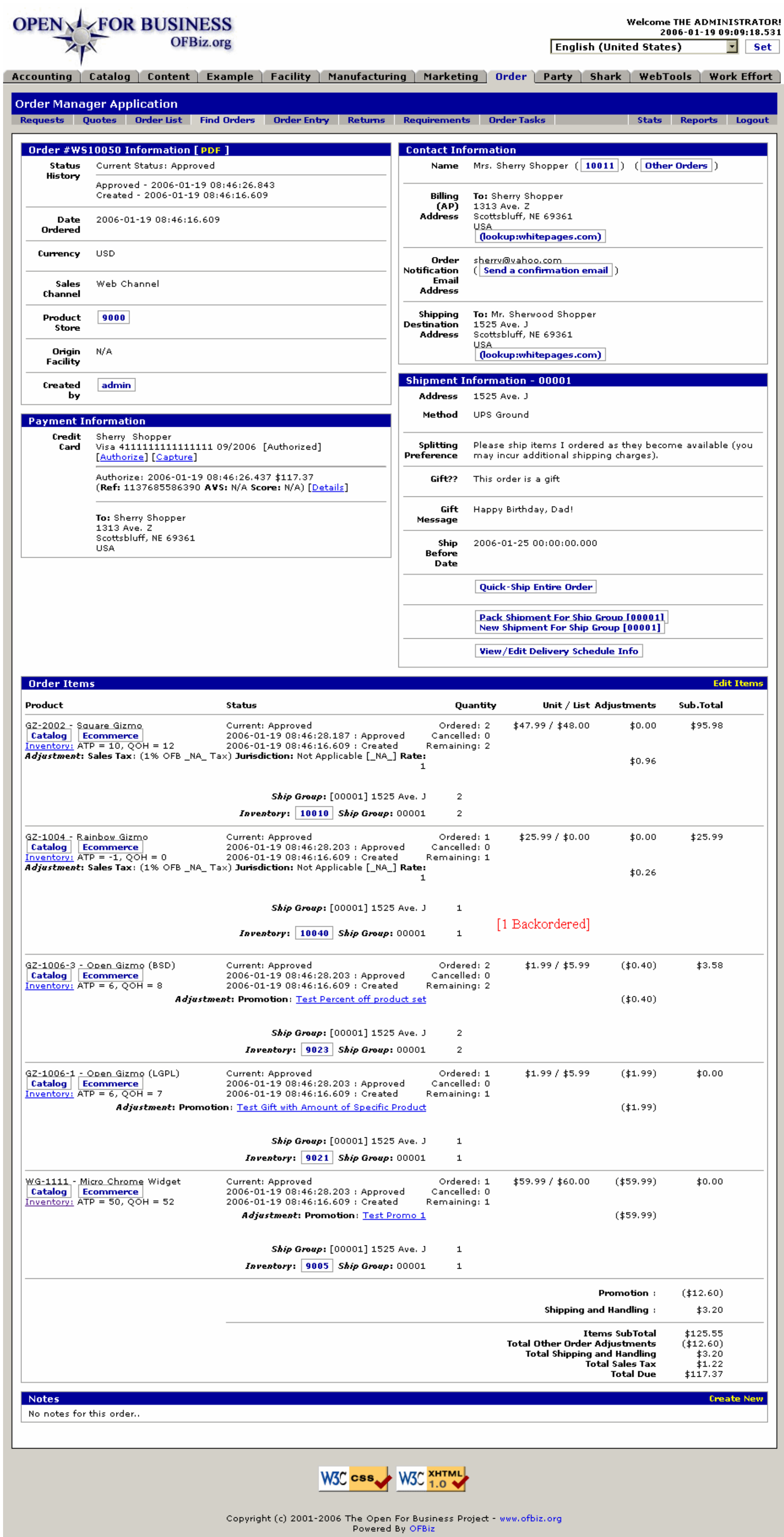
.6.10.3 Discussion of Create Order

Basically another view of the Finalize Order >> Order Confirmation screen, above, except note the Order Confirmation # which now appears after the words 'Order Confirmation.' A click on that number takes you back to the Find Orders tab and presents details about this order.<p> By clicking on [Create Order], you initiate the internal processes within other parts of OFBiz to adjust inventory, create paperwork for processing the order through the warehouse, enter financial information, and setup details needed in the Facility Manager to prepare to complete the order.<p>Whenever an error occurs which can be handled within the system, a message appears across the top of the screen.<p> There are no other links in this screen except the Order Confirmation Number which may appear in a different color in the upper band across the screen. Click on that number to proceed to the next step.

.6.11 View confirmed order

Info displayed dependent upon Status: Created, Approved, or Completed. As different parts of the order are shipped or fulfilled, those sections affected will change. <p> Note that not all links will appear all the time; displays are content driven.

.6.11.1 orderview



Once confirmed, the order appears here under the Find Order tab.

.6.11.2 link buttons

[Other Orders] [lookup:whitepages.com][Send a confirmation email] [Allow Split] [Authorize] [Capture] [Details] [Inventory] [New Shipment for Ship Group Nnnnnn] [Pack Shipment for Ship Group Nnnnnn] [Quick Ship Entire Order] [View / Edit Delivery Schedule Info] [Catalog] [Ecommerce] [Receive Payment] <B>[PDF] [Create New] [Edit Items] </B>

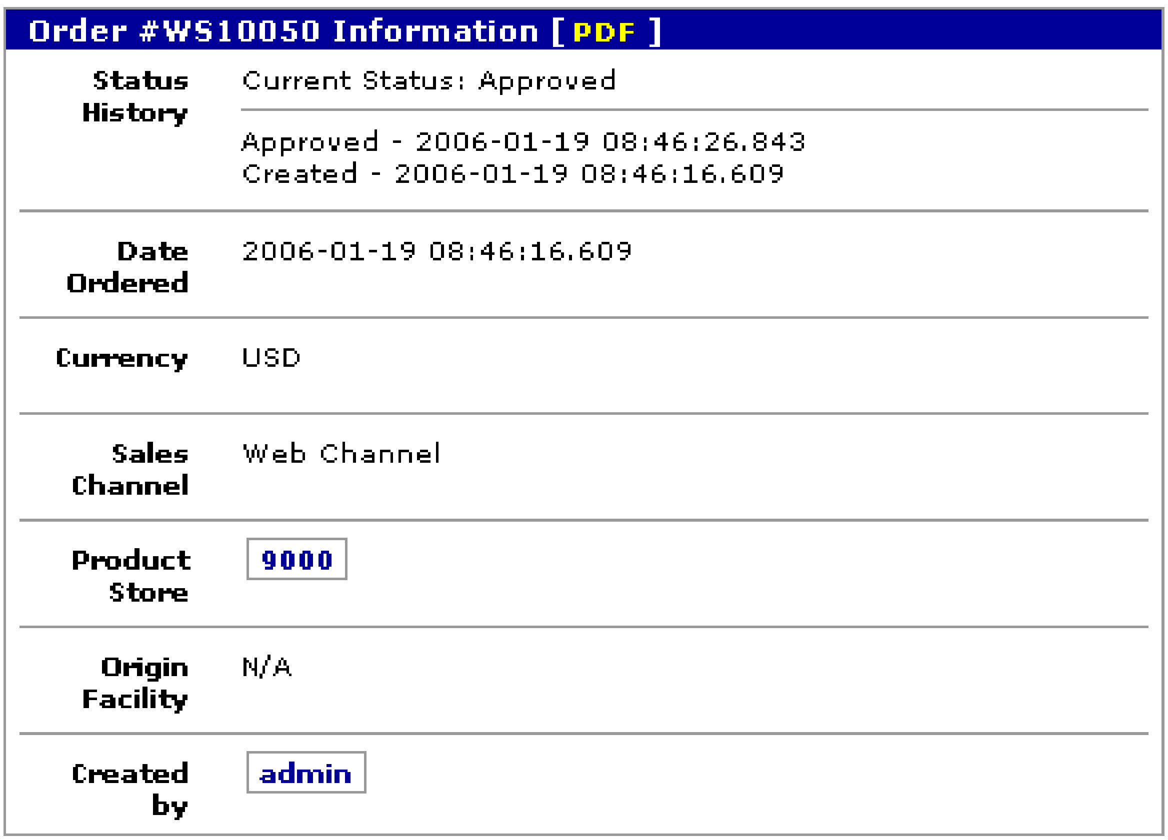
.6.11.3 Approve Order link

You might notice the link button [Approve Order] on the screen under <B>View order </B> in the upper LH corner of the 'Order Information' section. That approval action might be needed to process the order through the system, especially if it is to be paid after delivery, by check, or 'Paid Offline' for whatever reason. By clicking upon that link, you initiate the approval and processing actions. <p> Once 'Approved' by you, the display changes to show an updated Status going from 'Created' to 'Approved' along with the date and time of the actions. This is shown in the partial view of the same order presented below under <B> changeOrderItemStatus </B>. <p> Other parties elsewhere in the application can also perform the approval process as well as Cancel, Complete, or Ship the order. The Approval process is only discussed here as part of the <B>View Orders</B> process because of the occasional appearance of the [Approve Order] link on this particular screen.

.6.11.4 Order # Information

.6.11.4.1 changeOrderItemStatus

id:[11124] image:



This section indicates the Status History and other facts.

.6.11.4.2 PDF

Click on the highlighted PDF button and you will generate a PDF copy of this screen which can be printed and/or distributed to the customer and wherever needed in the company.

.6.11.4.3 Status History

Provides dates and times of order creation, approval, etc. <p> These statuses are only for the order. The status of shipments and payments associated with the order are tracked independently. Note that to achieve Completed status, you must have the completion of all shipments and receipt of all payments.

.6.11.4.4 Date Ordered

When the original order was placed.

.6.11.4.5 Currency

Which national currency is being used to pay for this order.

.6.11.4.6 Sales Channel

Did the order come in through ecommerce, an email, by phone, by snail mail, etc.

.6.11.4.7 Product Store

Click on the Product Store ID and another browser pops up in the Catalog Manager, Stores tab, Store sub-tab where you can view or make changes to the Store information.

.6.11.4.8 Origin Facility

If the order came in from another company (drop-ship, fulfillment house, another branch passing through the order, etc.), it will be given here.

.6.11.4.9 Created By

Click on the UserID here and another browser pops up in the Party Manager with the profile screen for the Party that created the order. If the order was created in ecommerce, this would be the ordering party, otherwise it is the party that entered the order.

.6.11.5 Payment Information

.6.11.5.1 Online Payment

Shows status of payments by Credit Card, EFT, PayPal, or whatever method of payment was authorized. Multiple payment methods are allowed.

.6.11.5.1.1 Credit Card Authorized

When taking the order, you will probably want to Authorize the use of the Credit Card before fulfilling the order. That is done automatically by the system here, as you can see by the status of [Authorized] shown within brackets but not active as a link, directly underneath the card number. Further status is given with the next section labeled 'Authorize' which gives some of the authorization details. <P> For those times when you need to manually authorize the Credit Card, click on the link [Authorize]. This will take you to the Accounting Manager in a separate browser or another tab, and you will see the screen shown below under Authorize. <P>After the order has been processed and either shipped or ready to ship, you may want to Capture the payment. For that purpose, click on the link [Capture] and you are taken to the Accounting Manager > Transactions tab and the screen shown below under Capture.<P> To see the details of a transaction, click on the [Details] link associated with it. The details of the Authorize transaction are shown below.

.6.11.5.1.1.1 Authorize

When you click to [Authorize] the charge, this working screen under the Accounting Manager is presented.

.6.11.5.1.1.2 Capture

id:[13542] image:

When you click on [Capture], this screen under the Accounting Manager is presented.

.6.11.5.1.1.3 Details

id:[13543] image:

When you ask for [Details] of a transaction or press the [Gateway Responses] link, this Accounting Manager screen is shown.

.6.11.5.1.2 Other payment methods

EFT transactions follow a path similar to that described above. Other methods, such as PayPal, WorldPay, purchase order payments, etc., each have their own similar process within this section of the Order screen, as needed.

.6.11.5.2 Offline Payment

If payment is to be made offline, a link will appear to take you to the Receive Payment screen, shown below. If the order has been shipped but is not yet paid for, a colored link [Receive Payment] may appear in this Payments section. When clicked upon, this provides a working screen as shown below where payments can be documented for receipt against the Invoice. Once entered, the payments will appear in the Accounting Manager under the

Payments tab.

.6.11.5.2.1 receivePayment

id:[11492] image:

Receiving an Offline Payment brings up this working screen. Enter amounts with currency signs.

.6.11.5.2.2 link buttons

[Go Back] [Save]

.6.11.5.3 Invoices

If an Invoice has been generated against this order, the Invoices # Link takes you to the Invoice view.

.6.11.6 Contact Information

All contact information associated with the order is listed here. Each item shows how it is related to the order; for example: billing address, shipping address, billing phone number, primary email address, etc. <p> Not everything listed here will appear on every order.

.6.11.6.1 Name

Click on the link to the Party ID in the Party Manager.

.6.11.6.2 Billing (AP) Address

The person placing the order (Contact Name) might be different from the Billing Party, or the Billing Address could be different from both the placing party and the ship-to party. The Billing Address, however, should correspond with the address known for the Credit Card owner by the financial institution. <P> Includes a lookup link to [lookup:whitepages.com] if you want a confirmation of the party.

.6.11.6.3 Order Notification Email Address

If your system has been setup, click on the link [Send a confirmation email] and it will generate a new message form to send email. Even better, your system can automatically transmit (auto-transponder) an email notification to this address with the order confirmation number and other relevant details upon Approval of the order.

.6.11.6.4 Shipping Destination Address

Has a white-pages lookup link for [lookup:whitepages.com].

.6.11.7 Shipment Information

.6.11.7.1 Note on multiple ship-to orders

Shipments to multiple recipients are divided into groups at the time the order is created. Each Group is listed in a separate section of this Order View.

.6.11.7.2 Address

Just enough of the address is given to confirm this item.

.6.11.7.3 Method

The shipping method (UPS, FedEx, USPS, etc., together with the priority level) as requested by the ordering party or defaulted by the system.

.6.11.7.4 Splitting Preference

Whether the customer wants the entire order shipped together after all items are available, or to ship in partial completions as items become available. If the choice was to Wait Until, a link is provided to quickly re-visit that decision upon contact with the ordering Party. Click on the link and the preference is changed to As Available. There is no option for going back, however.

.6.11.7.5 Gift?

Flags the request for gift wrapping or accompanying message if this is ordered as a gift.

.6.11.7.6 Shipment

This field only appears after the Shipment has been created. It includes the Shipment ID which can be clicked as a link to review the Shipping document. <P> Click on the <U>Packing Slip</U> link to create a PDF version of the Packing Slip which can be sent or emailed to the customer or for wherever a hardcopy of the Packing Slip might be needed.

.6.11.7.7 Message links - status dependent

.6.11.7.7.1 <U>Quick-Ship Entire Order</U> link

For expedited processing of the order through the system, this link can by-pass the manual procedure screens for picking, packing, etc., and prepare the paperwork to get the order out the door fastest.

.6.11.7.7.2 <U>Pack Shipment For Ship Group ... </U> link

Takes you to the Facility Manager to begin the process of preparing the items for shipment.

.6.11.7.7.3 <U>New Shipment For Ship Group ... </U> link

After the original shipment preparation has begun for this Ship Group, if new items need to be added, this is the link to invoke.

.6.11.7.7.4 <U>View/Edit Delivery Schedule Info</U> link

After the processing as advanced far enough to have generated a Shipment Plan, the delivery schedule can be seen and updated from this linked screen.

.6.11.7.7.5 <U>Quick-Refund Entire Order</U> link

After the order has been shipped, this link will appear in the same area instead of those discussed above. The Shipments field (above) will also appear. If the customer wishes to return the entire order, this link will begin the Returns process for every item.

.6.11.7.7.6 <U>Create Return</U> link

After the order has been shipped, you can pull up this order screen and review the order while consulting with a customer about a possible Return. If the Return appears warranted, click on this link to initiate the Return process, discussed below.

.6.11.8 Order Items

.6.11.8.1 Product

.6.11.8.1.1 Catalog link

Takes you to the main Product page for this item in the Catalog Manager in a seperate browser window.

.6.11.8.1.2 Ecommerce link

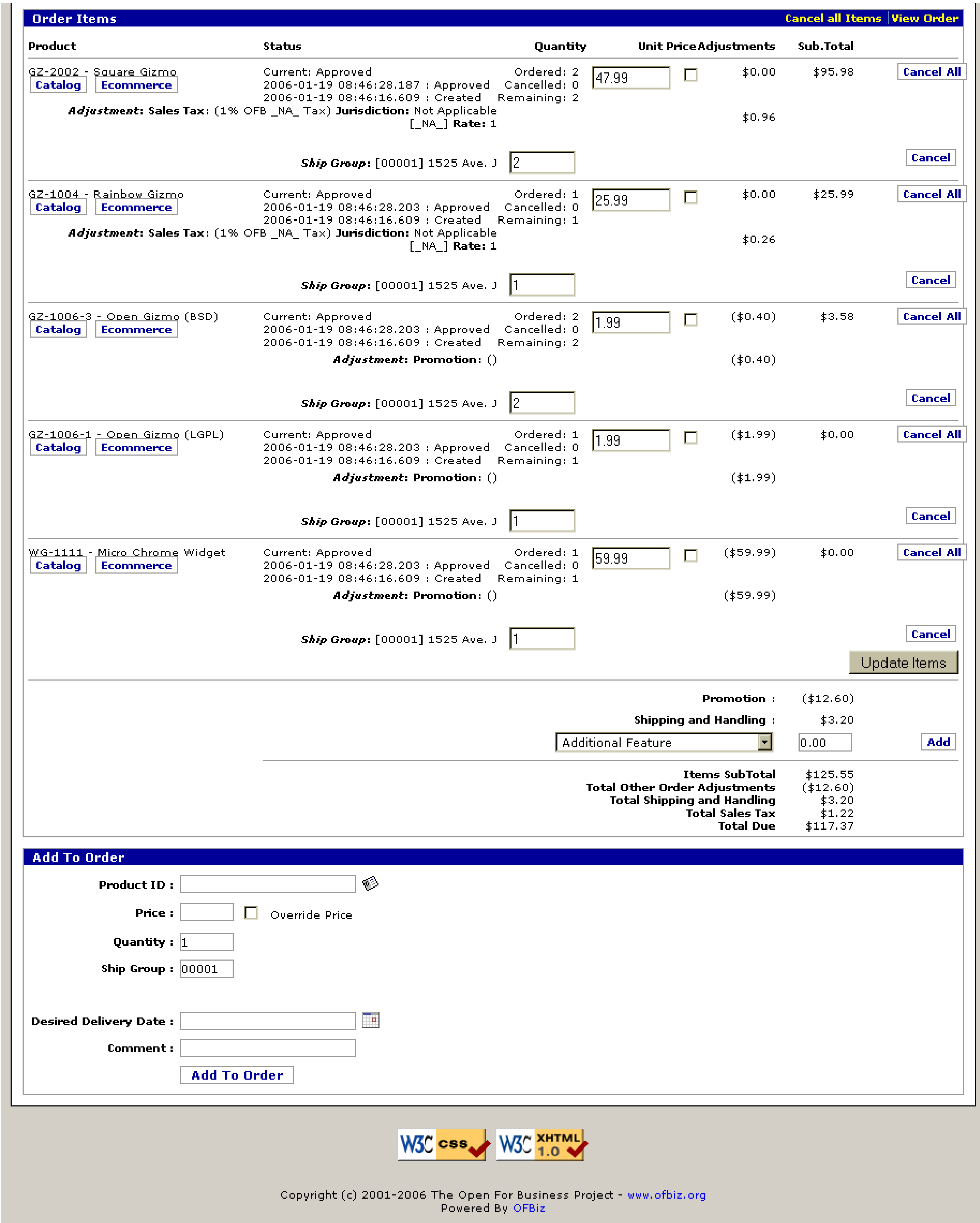
Click on the Ecommerce link to see this Product as displayed in the Ecommerce application. It will appear in a seperate popup browser window.

.6.11.8.1.3 Inventory link

Takes you to the Catalog manager, main Product tab, Inventory sub tab for this product in another popup browser window.

.6.11.8.2 Edit Items link

.6.11.8.2.1 EditItems



When you view the Order from the Edit Items screen, many more options open up to adjust or add to the Order.

.6.11.8.2.2 link buttons

[Cancel] [Cancel All] [Add] [Catalog] [Ecommerce] [Update Items] [Add To Order] <B>[Cancel all Items] [View Order]</B>

.6.11.8.2.3 Discussion

When you click on the Edit Items screen, it presents opportunities to make changes to the original order. Here you can cancel items, change the quantity, introduce additional price adjustments, and (with the Add To Order section), place more items into the order. <P> Each item is seperated from the others by a horizontal line. If you click [Cancel All], it will delete those checked items in any section. If you click [Cancel], it will delete only the checked item. If you click on the highlighted [Cancel All Items] link, all will be removed. You could then maintain the order by adding other items from the Add To Order section.<P> At the bottom of the screen is a new section for adding items to the order.

.6.11.8.3 Status - with links

Click on the Catalog link to see the item's catalog screen. Click on the Ecommerce link to see the presentation of this product in the Ecommerce application. <P> Click on the Inventory Item number and you are taken (in the same window) to the Facility Manager > Facilities tab > Inventory Items sub-tab with full details about the Inventory Item.

.6.11.8.4 Quantity from various perspectives

The Quantity is displayed from many different perspectives, among them:
 Ordered: 1
 Cancelled: 0
 Remaining: 1
 Shortfalled: 0

 Ship Request: 0
 Qty Shipped: 1
 Outstanding: 0
 Invoiced: 1
 Returned: 0 <P> If there is any circumstance needing attention, that item is highlighted. This would include Shortfalls, Outstanding items, Returns, etc.

.6.11.8.5 Unit / List price

What the order was sold for and the List Price for the item.

.6.11.8.6 Adjustments

Adjustments to the price in this order for discounts, promotions, etc.

.6.11.8.7 Sub Total

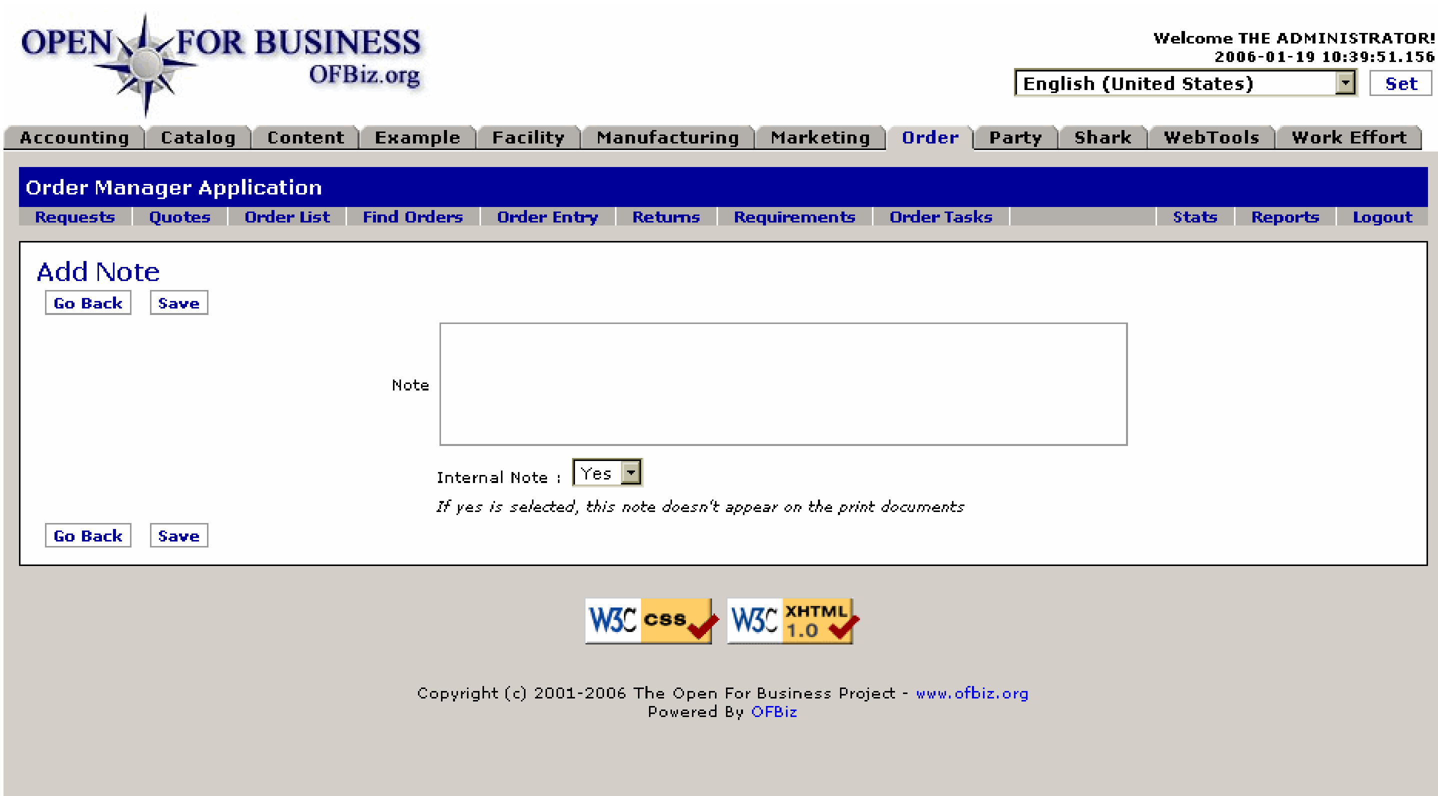
Quantity shipped times the sales prices less adjustments.

.6.11.8.8 Adjustments: Additional Feature

In this section, totals for Promotions and amounts for other adjustments are shown. In the Edit Item view, any additional adjustments can be posted using the drop-down box. Place a minus sign (-) before the number for reductions. Options might include:<p><B> Discount
Fee
Miscellaneous Charges
Promotion
Replacement
Sales Tax
Shipping and Handling
Surcharge
Warranty</B>

.6.11.9 Notes - Create New

.6.11.9.1 CreateNewNote



This Note will stay with the Order. If "No" is selected, it will also appear on the printed documents to the customer.

.6.11.9.2 link buttons

[Go Back] [Save]

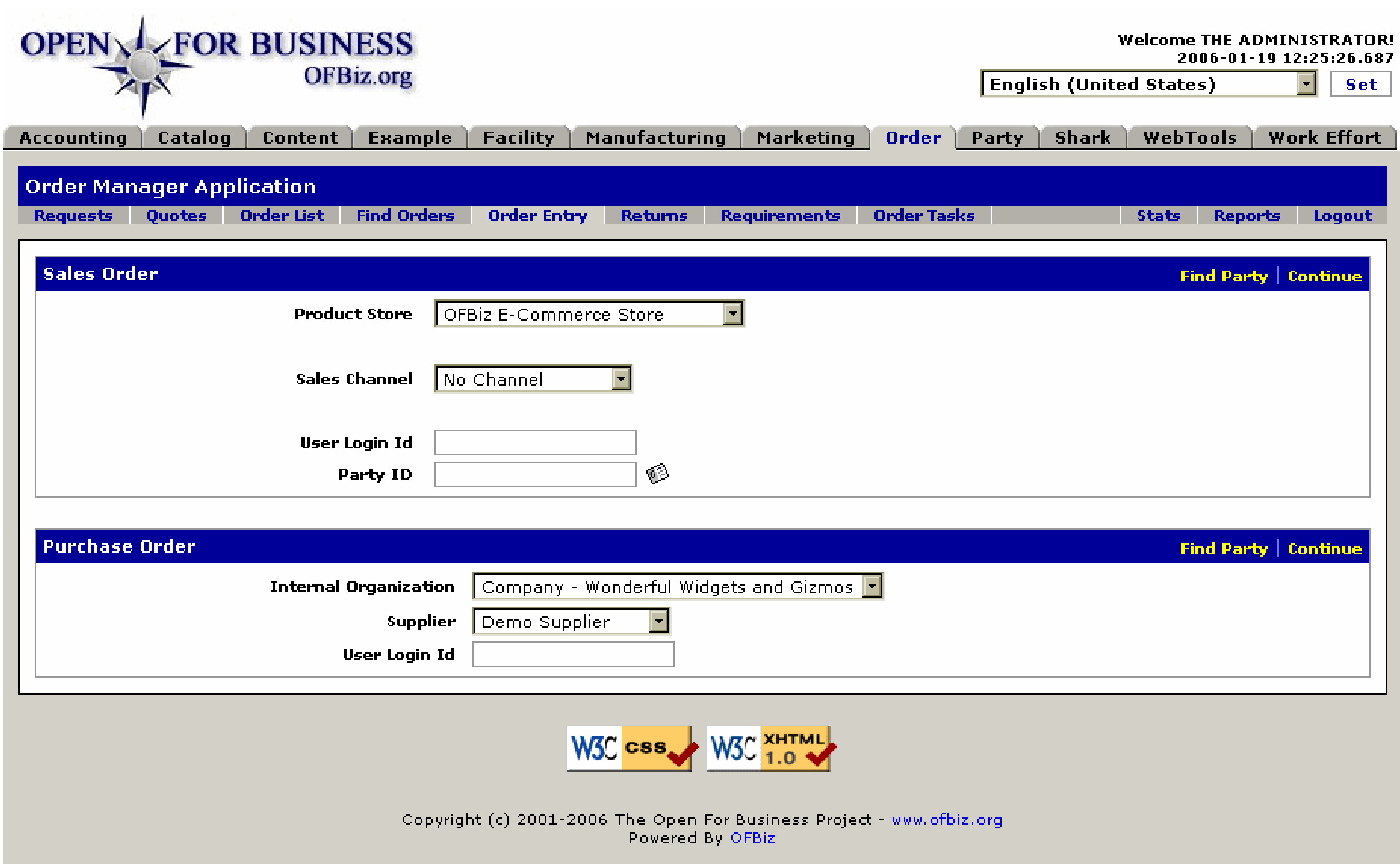
.7 Order Entry - Purchase Order

.7.1 Purchase Order - discussion

The Purchase Order process is used to order items from suppliers for use or resale by your company. Use only the lower portion of the first screen to identify your supplier and begin your Purchase Order. <P> NOTE: If you find yourself stuck at the Purchase Order screen and wish to return to the following screen to select a different vendor or to enter a Sales Order, click on the [Clear Order] button to return here.

.7.2 orderentry-PO

id:[11127] image:



Work in the Purchase Order (lower) section of this screen to identify the supplier and yourself; press [Continue] when ready.

.7.3 link buttons

<B> [FindParty] [Continue] </B>

.7.4 Create Purchase Order - 1

.7.4.1 initorderentry

This screen asks for a choice of Agreements OR a choice of currency. Many other links are also provided.

.7.4.2 link buttons

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Select One]<B> [Clear Order] </B>

.7.4.3 Create Purchase Order (screen 1)

In this instance, you are asked to set a different currency or, if agreements are in place with the supplier, to use a bullet to identify the applicable agreement. Click on the [Select One] link associated with your choice to continue.

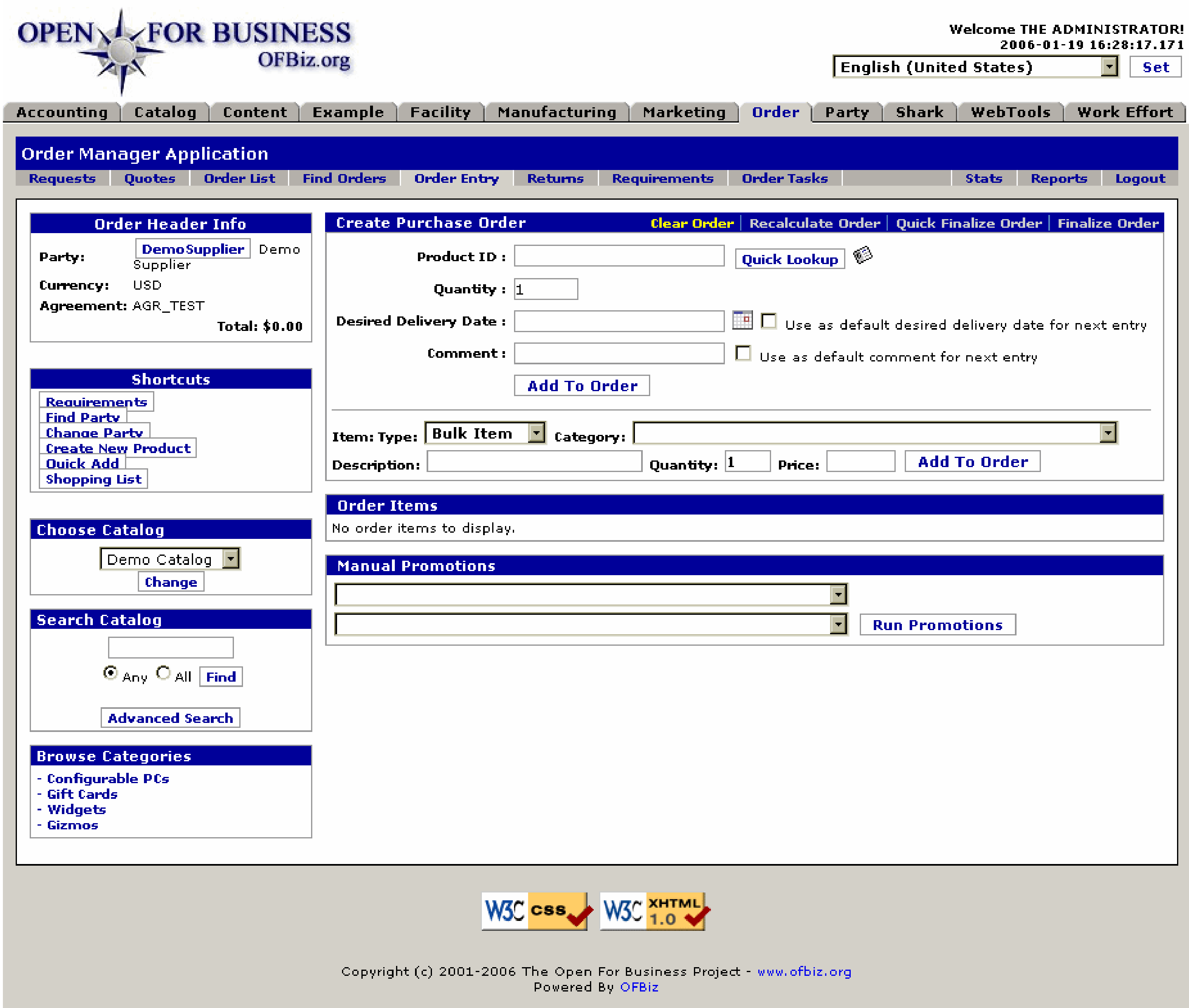
.7.5 Create Purchase Order - 2

.7.5.1 Discussion

From here you still have the same options available along the left-hand column. Note that the Agreement Name has been added to the Order Header Info section.<p> To create the order, select order items and they will be populated into the fields. Indicate quantity, desired delivery date, and enter any comments you wish.

.7.5.2 setOrderAgreement

id:[11137] image:



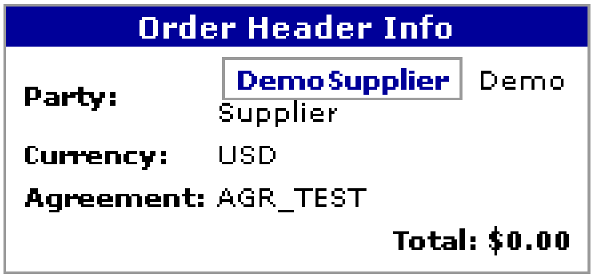
Begin to enter your order items from this screen. Many links and tools here help identify products or prepare your order.

.7.5.3 link buttons

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Quick Lookup] [Add To Order] <B> [Clear Order] </B>

.7.5.4 Order Header Info

.7.5.4.1 OrderHeader



Total will reflect the value of the order.

.7.5.4.2 Discussion

Identifies the Party, the Currency, the applicable Agreement and the order Total. The Total will reflect items ordered but may not include tax, shipping or discounts. Click on the Party ID to view more information about the Party to which you are placing the order.

.7.5.5 Shortcuts

.7.5.5.1 Requirements

.7.5.5.1.1 RequirementsForSupplier

id:[12868] image:

If Requirements have been created for products from this Supplier, they can be identified from this screen.

.7.5.5.2 Find Party

Takes you to the Party Manager -> Find Party screen.

.7.5.5.3 Change Party

.7.5.5.3.1 checkinits-PO

id:[12869] image:

If you suddenly realize you are working with the wrong Supplier, come here to change.

.7.5.5.4 Create New Product

While talking with your Supplier, you learn of a new product that you just have to have! Click on the Create New Product link from your PO order entry screen and you are taken directly to the Catalog Manager -> EditProduct screen. There you can create the product so it can be identified for ordering from your Supplier.<P> When finished, click on the Order Manager -> Order Entry screen; you are returned to your incomplete Purchase Order.

.7.5.5.5 Quick Add

.7.5.5.5.1 quickadd-PO

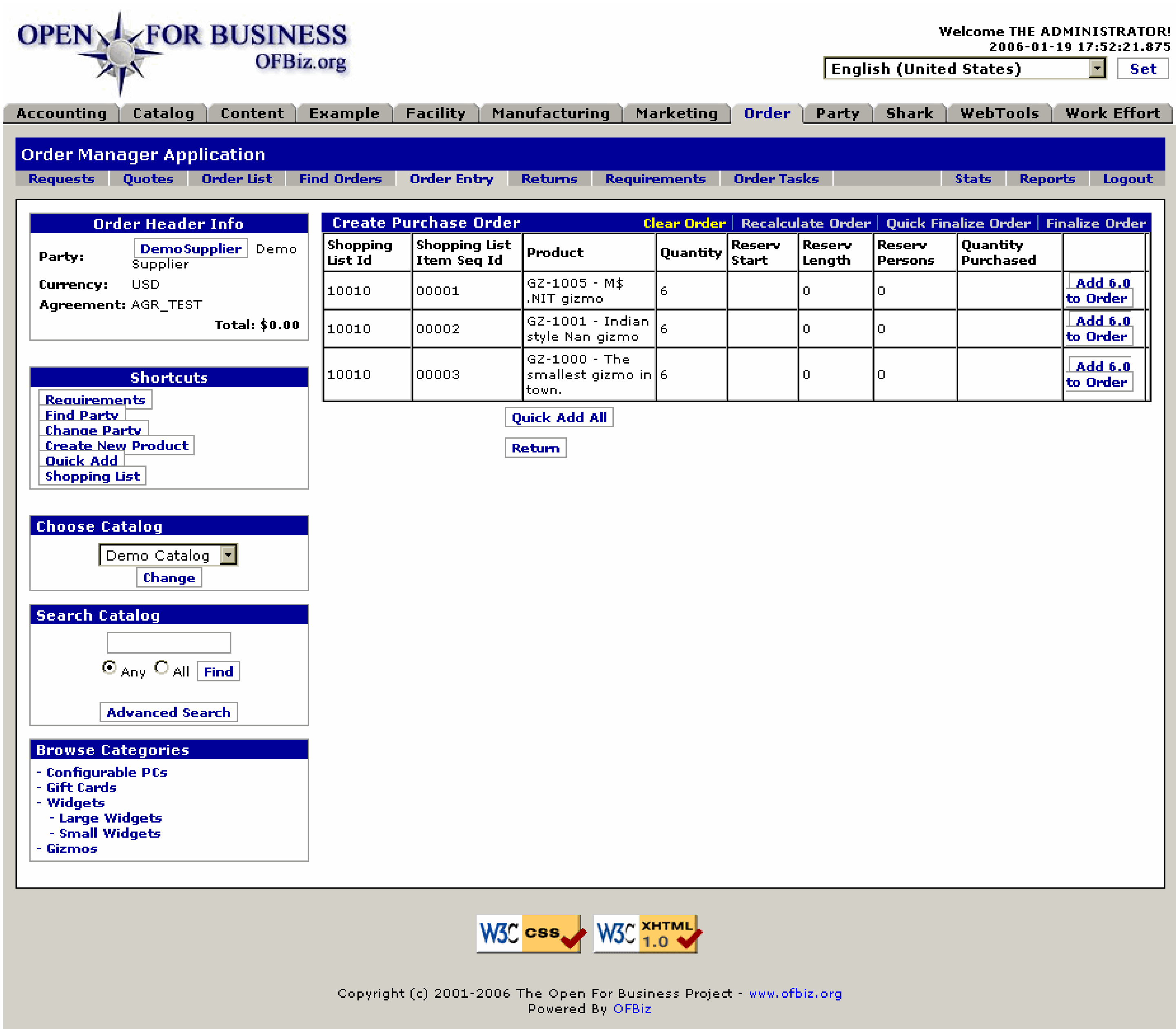
From Category Catalogs you have assembled, a Vendor's items can be quickly presented here for adding to your order.

.7.5.5.5.2 link buttons

[Choose QuickAdd Category] [Choose] [Add All to Cart] [Variation...]

.7.5.5.6 Shopping List

.7.5.5.6.1 addFromShoppingList-PO



After you have identified which shopping list you want to use, it is presented here for your selections.

.7.5.5.6.2 link buttons

[Add 1 To Order] [Quick Add All] [Return]

.7.5.5.6.3 Discussion

During the order process, you have the opportunity to create or edit a Shopping List. These can be especially convenient in the Purchase Order process because you can tailor the Shopping List to the Vendor and then pull up that list whenever ordering something from them. Some Vendors might provide so many different items that you will want to have lists by categories or type of products. <P> This [Shopping List] link is where you pull up a list of all your lists and then select which one you want. The screen shown above is given after you have chosen your List. <P> Click on [Return] to go back to the PO Items screen.

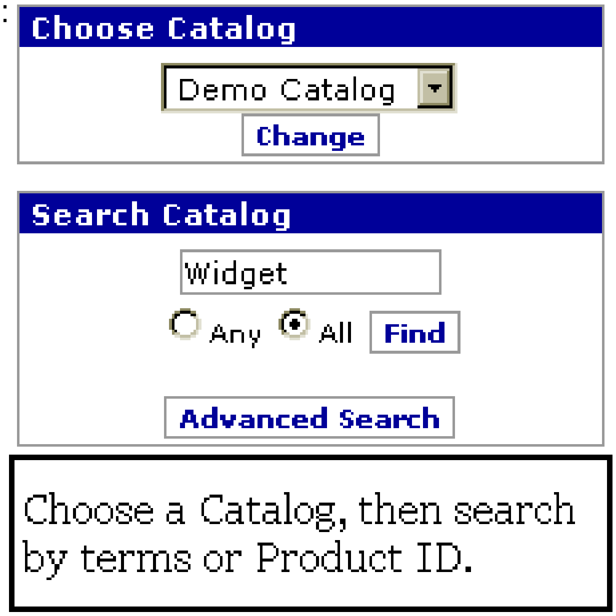
.7.5.6 Choose Catalog

.7.5.6.1 Catalog (drop-down box)

Choose your supplier's catalog from the drop-down box and click on [Change].

.7.5.7 Search Catalog

.7.5.7.1 CatalogSearch

id:[13559] image: 

.7.5.7.2 link buttons

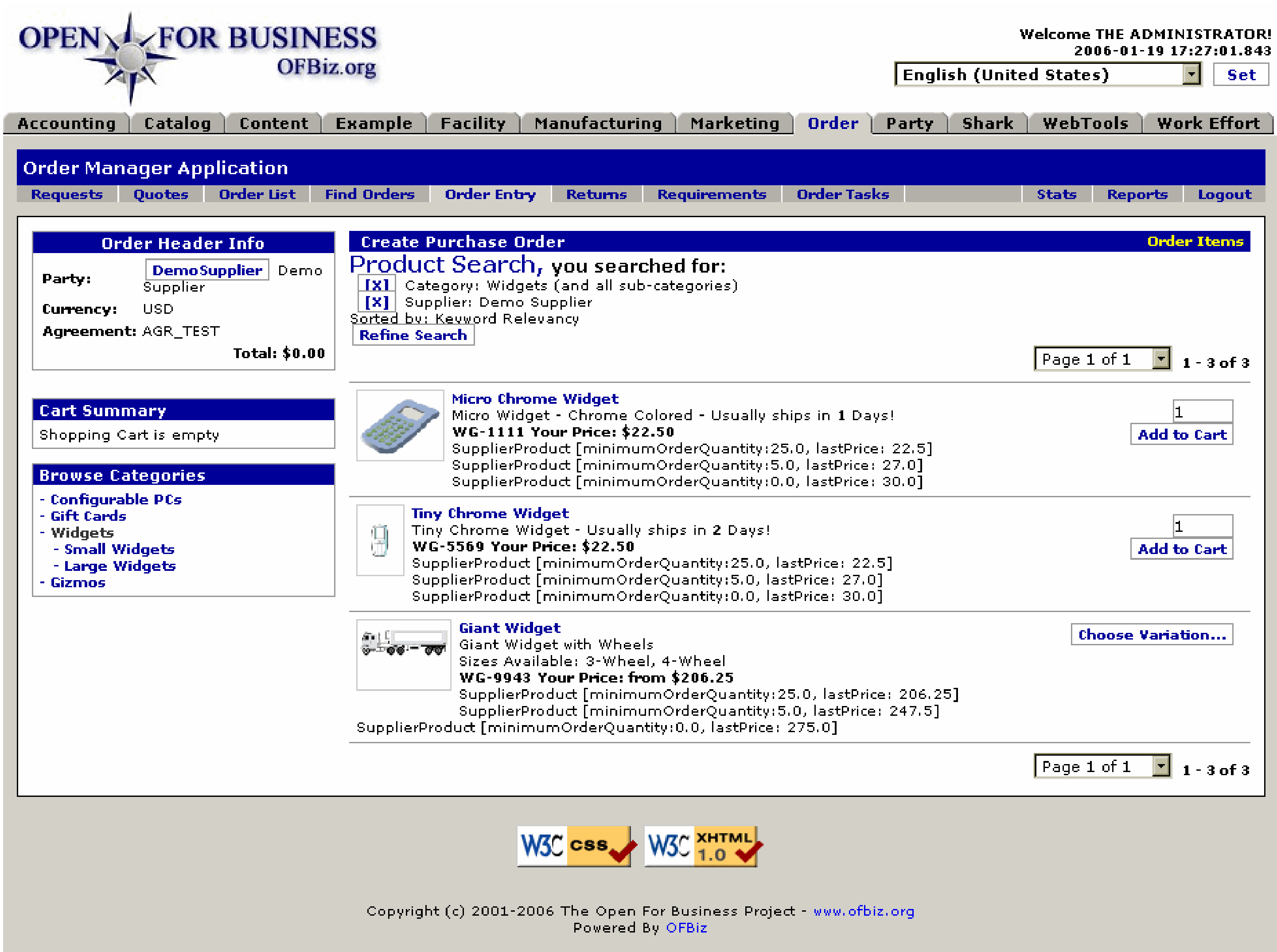
[Change] [Find] [Advanced Search]

.7.5.7.3 Discussion

Based upon the Catalog chosen above, enter a term (such as Widgets, or Purple, or Massive). Then select a radio button to return Any or All hits for the search term. When you click on [Find], a screen with the results will be presented. Use [Advance Search] to reduce the search if too many hits are returned.

.7.5.8 Browse Categories

.7.5.8.1 BrowseCategories



Browsing the larger category of Widgets brought up this screen. Add to cart, then return to Order Items.

.7.5.8.2 link buttons

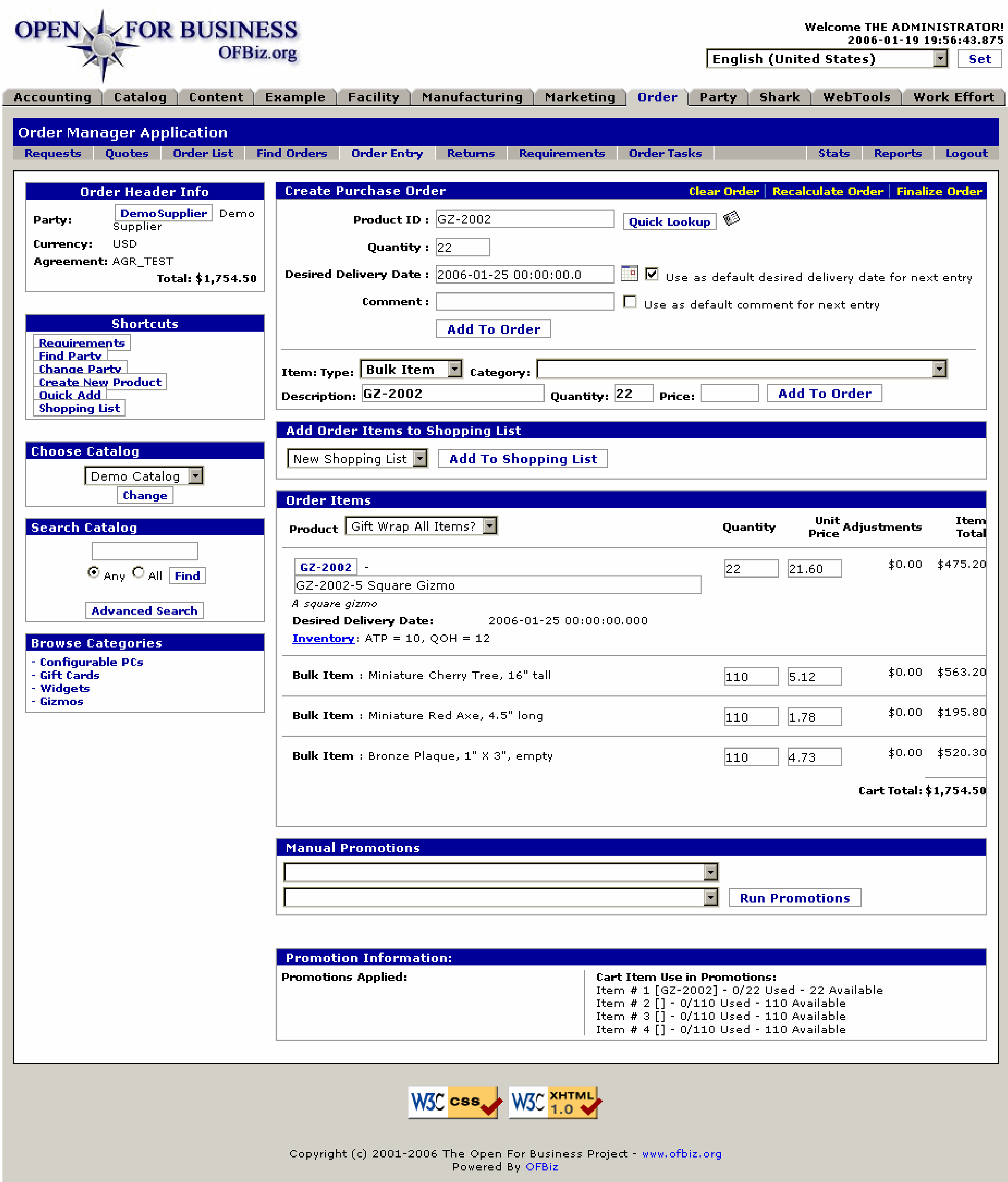
[Add to Cart] [Choose Variations] <B>[Order Items] </B>

.7.5.8.3 Discussion

To be taken to this screen of products within categories, click on a selected category and you have what is shown above. Click on [Order Items] to return to the main screen.

.7.6 Create Purchase Order - 3

.7.6.1 additem



A mix of stock replenishment and components to manufacture a custom order for 110 WashingtonWidgets is shown.

.7.6.2 link button

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Quick Lookup] [Add to Order] [Add To Shopping List] [Run Promotions] <B> [Clear Order] [Recalculate Order] [Finalize Order] </B>

.7.6.3 Create Purchase Order - Screen 2

.7.6.3.1 Discussion

Adds details in the Order Items section to the items already selected and brings out the processing link buttons to [Recalculate Order] and [Finalize Order]. The screen will remain the same with each added item as the Order Items section becomes larger with new items. <P> NOTE: If ordering from a Vendor that does not use your Product ID designations, you should probably use the Non-ID section discussed below.

.7.6.3.2 Product ID (popup search tool)

Use the pop-up search engine screen to identify products.

.7.6.3.3 Quantity

How many of the item do you want?

.7.6.3.4 Desired Delivery Date (popup calendar)

Check the box if you wish subsequent items to have the same delivery date.

.7.6.3.5 Comment

Check the box if you wish subsequent items to be accompanied with the same comment.

.7.6.3.6 Non-ID order section

.7.6.3.6.1 Item Type (drop-down box)

Is this a Work Item? A Bulk Item? Select the type from the drop-down box.

.7.6.3.6.2 Category

Enter the Category here if you need to clarify things for the Vendor. Remember, this is a Purchase Order, so you need to provide information for the Vendor as well as your Accounting Department and your Receiving Department.

.7.6.3.6.3 Description

Does the Vendor have a different product name than what you use when you re-sell? Does he have a bulk shipment product package, such as 'One Pallet of 20 Large Gizmos'? Enter that description here. <P> Remember, again, this is a Purchase Order, so you need to provide information for the Vendor as well as your Accounting Department and your Receiving Department.

.7.6.3.6.4 Quantity

When entering Quantity, bear in mind that while you may be getting 12 Widgets, your order might be for 1 Dozen; specify the quantity of the units that are being according to the way the Vendor measures them.

.7.6.3.6.5 Price

This is a price already determined from a catalog, a price sheet, a bid, or other established price from the Vendor, NOT the price at which you may eventually sell it.

.7.6.4 Add Order Items to Shopping List

.7.6.4.1 Discussion

Choose which shopping list to add to, then click on [Add To Shopping List].

.7.6.5 Order Items

.7.6.5.1 Product

Except for Bulk Items, you can click on the Product ID to see more about it in the Catalog manager. You can also edit the description if you need to.

.7.6.5.2 Gift Wrap (drop-down box)

If your vendor is doing drop-ship directly to your customer, this option allows for gift-wrapping by the Vendor. 'No Gift Wrap' is probably the more common choice here.

.7.6.5.3 Quantity

How many you requested above; you can modify the quantity here as needed.

.7.6.5.4 Unit Price

This can be adjusted here to accommodate pricing you have negotiated with the vendor, for example.

.7.6.5.5 Adjustments

Cannot be edited here.

.7.6.5.6 Item Total

Price times quantity less adjustments.

.7.6.5.7 Comment

Here you can add information regarding this item, or the Comment could be identical to each item.

.7.6.5.8 Desired Delivery Date

Telling the Vendor when you would like to receive the product or service by.

.7.6.5.9 Inventory (link)

The QOH and ATP are stated here for YOUR inventory, not the Vendor's. If you click on the Inventory link, you are taken to the Catalog Manager Main tab, Inventory sub-tab for the Product ID which shows all inventory for this product. You can also check there on incoming shipments, anticipated production runs, and outstanding Purchase Orders. This might be a good screen to check whenever placing new Purchase Orders to avoid duplication, etc.

.7.6.5.10 Cart Total

Total for all the items ordered so far. Does not include taxes, shipping or other adjustments which are determined in subsequent steps.

.7.6.6 Promotion Information

.7.6.6.1 Manual Promotions

This works just like under the Sales Order Entry method. <P> If you have established promotional discount terms with a vendor, such as price breaks for volume purchases, create a Promotion with those terms under the Catalog Manager > Promotions tab. Then when you create a Purchase Order where those terms can be applied, use the drop-down boxes to select them. When a Promotion or two Promotions are identified in the Manual Promotions drop-down box(es), click on [Run Promotions]. The calculation should be incorporated into the pricing of the Purchase Order.

.7.6.6.2 Adding by Agreement

Promotions can be applied to a Purchase Order as part of an Agreement which is invoked when you begin to create the Purchase Order. Here are the steps involved: <P> - 1.) Create one or more Promotions (under the Catalog Manager > Promos tab) that will be applicable by Agreement to this Vendor. - 2.) Open an existing or new Agreement under the Acounting Manager - Agreements tab.
 - 3.) Under Agreement Terms, create an Agreement Item of the 'Pricing Program' type.
 - 4.) Open the Promotions tab. Find the applicable Promotion from the drop-down box and apply it. <P> Now any time when the Agreement is incorporated as part of a Purchase Order, the terms of this Promotion will apply. If more than one Vendor offers the same terms, you can apply them in your seperate agreement with that Vendor as well. Similarly, if details of the promotion are changed, you only need to amend the Promotion, not the Agreement, and the new terms will be included.

.7.7 Recalculate Order

When changes are made to the order within the Order Items section, click on [Recalculate Order] to update the cart information. You will also see the new total reflected in the Order Header Info section.

.7.8 Finalize PO - Terms

.7.8.1 finalizeOrder-PO1

id:[DOCORD598] image:

The order finalization process begins with a confirmation of Terms. Press [Continue] to accept all terms and proceed.

.7.8.2 link buttons

[Create New] [update] [remove] <B>[Order Items] [Order Terms] [Continue]</B>

.7.8.3 Term Type

Defines or describes the Term.

.7.8.4 Term Value

Usually a percentage or an amount of currency.

.7.8.5 Term Days

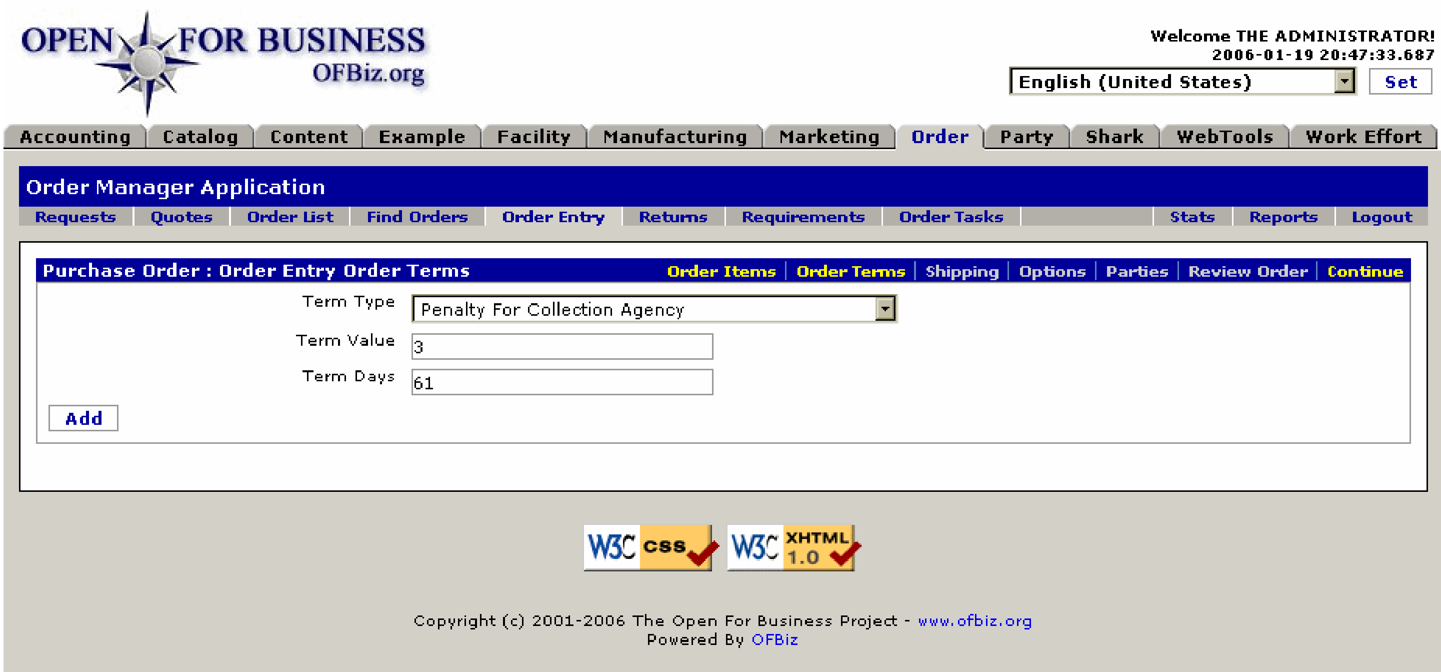
Period of compliance to meet the requirements of the term.

.7.8.6 Edit Terms (Update / Create New)

The screen to [Update] existing terms is already populated; [Create New] presents empty fields.

.7.8.6.1 setOrderTerm

id:[11985] image:



Enter new term, then press [Add] to return to PO-Terms, or [Continue] to advance to the Shipping portion.

.7.8.6.2 link buttons

[Add] <B>[Order Items] [Order Terms] [Continue]</B>

.7.9 Finalize PO - Shipping

.7.9.1 Discussion

Use the appropriate radio button to select the Ship-to address. Click on Update if changes are needed. Click on [Continue] to proceed, but use the [Continue] link associated with the specified address or the selected Ship-to Party.

.7.9.2 finalizeOrder-PO2

Confirm the Ship-to address, [Update with a new or revised address, or Ship to Another Party.

.7.9.3 link buttons

[Update] <B>[Order Items] [Order Terms] [Shipping] [Continue] </B>

.7.9.4 To: ... (radio buttons)

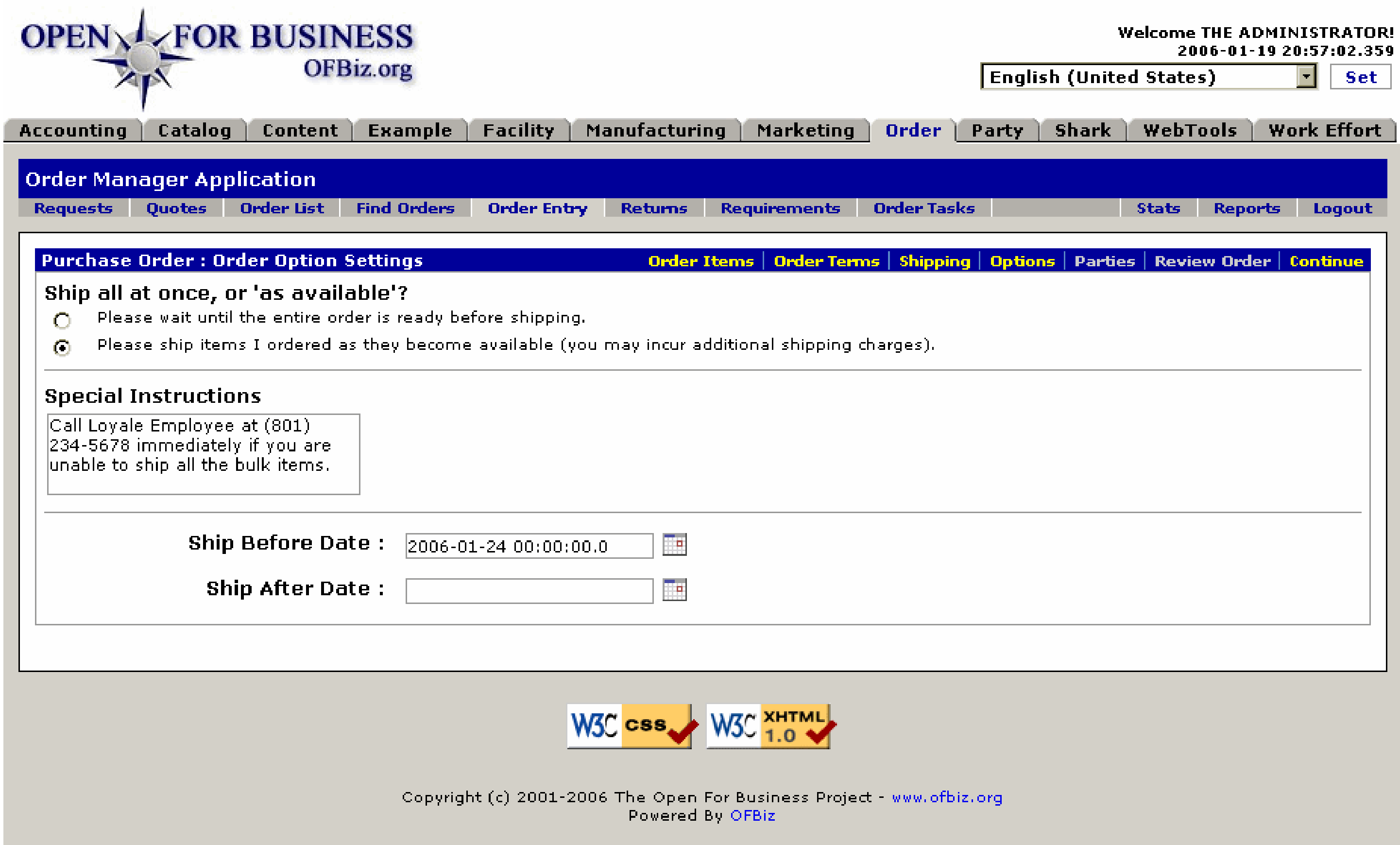
Select a radio button which gives the correct address. Then click on <B>[Continue] </B>to progress to the next screen.

.7.9.5 Party ID (popup search tool)

If the recipient for this Purchase Order is another Party, identify the Party from this tool. Either enter the Party ID in the box or use the popup search tool.

.7.10 Finalize PO - Options

.7.10.1 finalizeOrder-PO3



Indicate shipping instructions (split-order preferences, ship date) and enter Special Instructions here, then press [Continue].

.7.10.2 link buttons

<B>[Order Items] [Order Terms] [Shipping] [Options] [Continue] </B>

.7.10.3 Ship All ... As Available

Select applicable Radio Button.

.7.10.4 Special Instructions

Enter whatever needs to be communicated to the Vendor regarding the shipment.

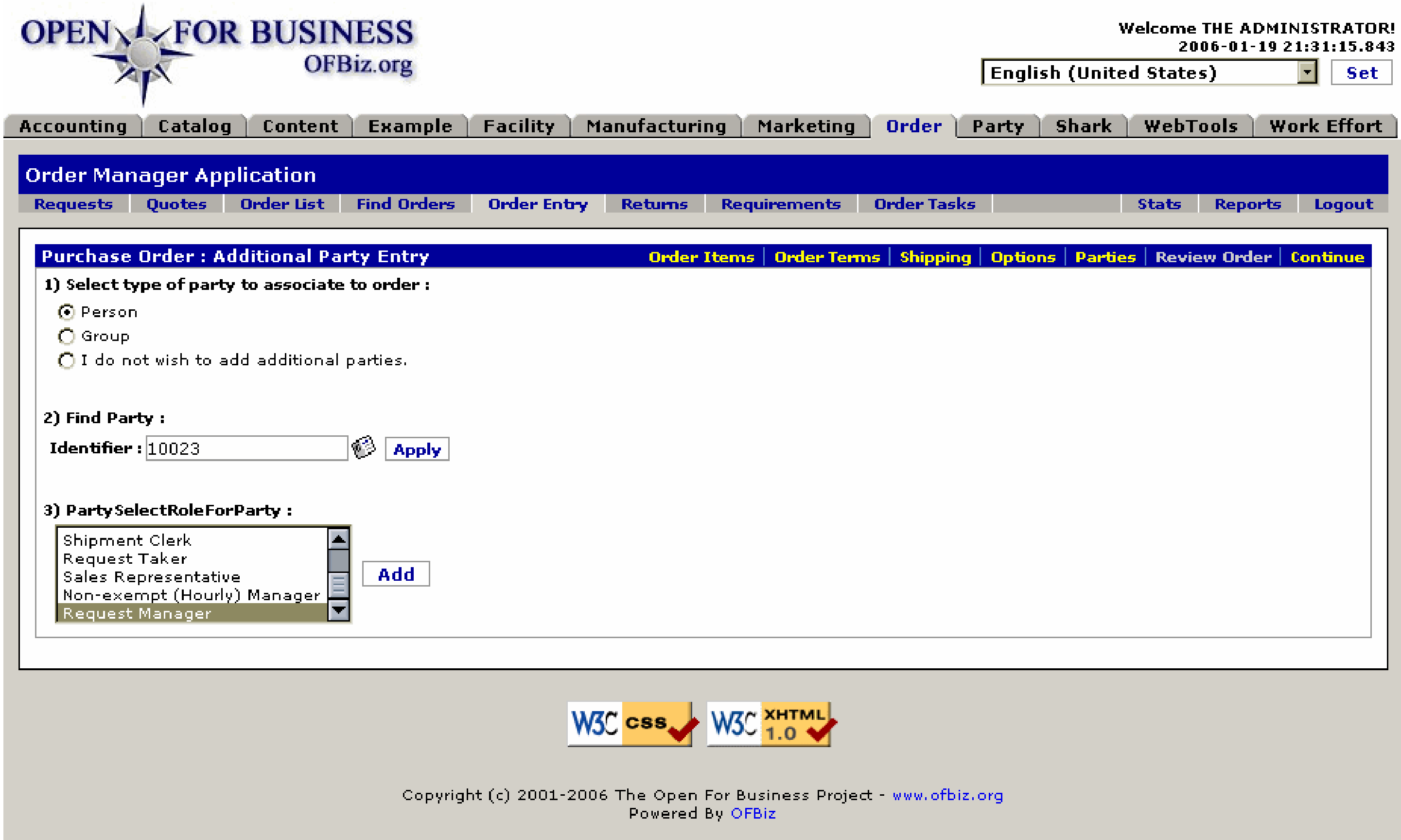
.7.10.5 Ship Before / After Date

Use the popup calendars if a specific date is requested for the supplier to ship on before or after.

.7.11 Finalize PO - Parties

If you wish to associate other parties - individual or group - with the order, the appropriate Radio Button will start that process. This step is optional; you may click directly on [Continue] to bring up the final review screen.

.7.11.1 finalOrder-PO4



Optional - associate a specific Party to this PO by the 3-step process. [Add] brings up the a confirmation screen.

.7.11.2 link buttons

[Add] [Apply]<B> [Order Items] [Order Terms] [Shipping] [Options] [Parties] [Continue] </B>

.7.12 Finalize PO - Review

This is your final chance to make changes to the order. Use the link buttons to return to whatever step in the Purchase Order creation process you need to make any changes. When all is correctly displayed here, click on the [Create Order] link. <p> Once the order is processed within the application, a nearly identical screen will appear with an order confirmation number showing, but without the link buttons. See <B>'PO Confirmation' </B>below. Click on the Order Confirmation Number to accept and confirm the completed order.

.7.12.1 finalOrder-PO5

Welcome THE ADMINISTRATOR!
2006-01-19 21:34:45.625
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

Purchase Order : Order Confirmation Order Items | Order Terms | Shipping | Options | Parties | Review Order | Create Order

Order for Demo Supplier [DemoSupplier]

Destination **To:** Company XYZ
Attn: ZJAA
2003 Open Blvd
Orem, UT 84058
USA

Order Terms

Term Type	Term Value	Term Days
Payment (net days)		30
Payment (discounted if paid within specified days)	2	10

Splitting Preference Please ship items I ordered as they become available (you may incur additional shipping charges).

CommonInstructions Call Loyale Employee at (801) 234-5678 immediately if you are unable to ship all the bulk items.

Ship Before Date 2006-01-24 00:00:00.000

Order Items

Product	Quantity	Unit Price	Adjustments	Sub.Total
GZ-2002 - GZ-2002-5 Square Gizmo	22	$21.60	$0.00	$475.20
Bulk Item : Miniature Cherry Tree, 16" tall	110	$5.12	$0.00	$563.20
Bulk Item : Miniature Red Axe, 4.5" long	110	$1.78	$0.00	$195.80
Bulk Item : Bronze Plaque, 1" X 3", empty	110	$4.73	$0.00	$520.30
			Sub.Total	$1,754.50
			Shipping and Handling	$0.00
			Sales Tax	$0.00
			Grand Total	$1,754.50

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Here is the Final Review of the Purchase Order. If all is OK, click on [Create Order]. Active links will navigate you back to edit.

.7.12.2 link buttons

<B> [Order Items] [Order Terms] [Shipping] [Options] [Parties] [Review Order] [Create Order] </B>

.7.12.3 PO-Confirmation

Click on the Order Confirmation in the upper LH section; the next screen will be "Order Information" under Find Orders.

.7.13 Approve Purchase Order

.7.13.1 ApproveOrder

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Welcome THE ADMINISTRATOR!
2006-01-19 22:00:10.562
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

Order #WS10060 Information [PDF] — Approve Order

Status History	Current Status: Created Created - 2006-01-19 21:38:46.656
Date Ordered	2006-01-19 21:38:46.656
Currency	USD
Sales Channel	Unknown Channel
Product Store	9000
Origin Facility	N/A
Created by	admin

Contact Information

Name	Demo Supplier (DemoSupplier) (Other Orders)
Shipping Destination Address	**To:** Company XYZ **Attn:** ZJAA 2003 Open Blvd Orem, UT 84058 USA (lookup:whitepages.com)

Shipment Information - 00001

Address	2003 Open Blvd
Method	No Shipping
Splitting Preference	Please ship items I ordered as they become available (you may incur additional shipping charges).
CommonInstructions	Call Loyale Employee at (801) 234-5678 immediately if you are unable to ship all the bulk items.
Gift??	This order is not a gift
Ship Before Date	2006-01-24 00:00:00.000

View/Edit Delivery Schedule Info

Order Terms

Term Type	Term Value	Term Days
Payment (net days)		30
Payment (discounted if paid within specified days)	2	10

Order Items — Edit Items

Product	Status	Quantity	Unit / List	Adjustments	Sub.Total
N/A - Bronze Plaque, 1" X 3", empty Catalog Ecommerce	Current: Created 2006-01-19 21:38:46.656 : Created	Ordered: 110 Cancelled: 0 Remaining: 110	$4.73 / $0.00	$0.00	$520.30
	Ship Group: [00001] 2003 Open Blvd	110			
N/A - Miniature Red Axe, 4.5" long Catalog Ecommerce	Current: Created 2006-01-19 21:38:46.656 : Created	Ordered: 110 Cancelled: 0 Remaining: 110	$1.78 / $0.00	$0.00	$195.80
	Ship Group: [00001] 2003 Open Blvd	110			
N/A - Miniature Cherry Tree, 16" tall Catalog Ecommerce	Current: Created 2006-01-19 21:38:46.656 : Created	Ordered: 110 Cancelled: 0 Remaining: 110	$5.12 / $0.00	$0.00	$563.20
	Ship Group: [00001] 2003 Open Blvd	110			
GZ-2002 - GZ-2002-S Square Gizmo Catalog Ecommerce Inventory: ATP = 10, QOH = 12	Current: Created 2006-01-19 21:38:46.656 : Created	Ordered: 22 Cancelled: 0 Remaining: 22	$21.60 / $0.00	$0.00	$475.20
Price Rule: [:] SupplierProduct [minimumOrderQuantity:5.0, lastPrice: 21.6]			$0.00		
Price Rule: [:] SupplierProduct [minimumOrderQuantity:0.0, lastPrice: 24.0]			$0.00		
	Ship Group: [00001] 2003 Open Blvd	22			

Items SubTotal	$1,754.50
Total Other Order Adjustments	$0.00
Total Shipping and Handling	$0.00
Total Sales Tax	$0.00
Total Due	$1,754.50

Notes — Create New

No notes for this order..

After making any changes, click on the [Approve Order link at the top of the Order Information section.

.7.13.2 link buttons

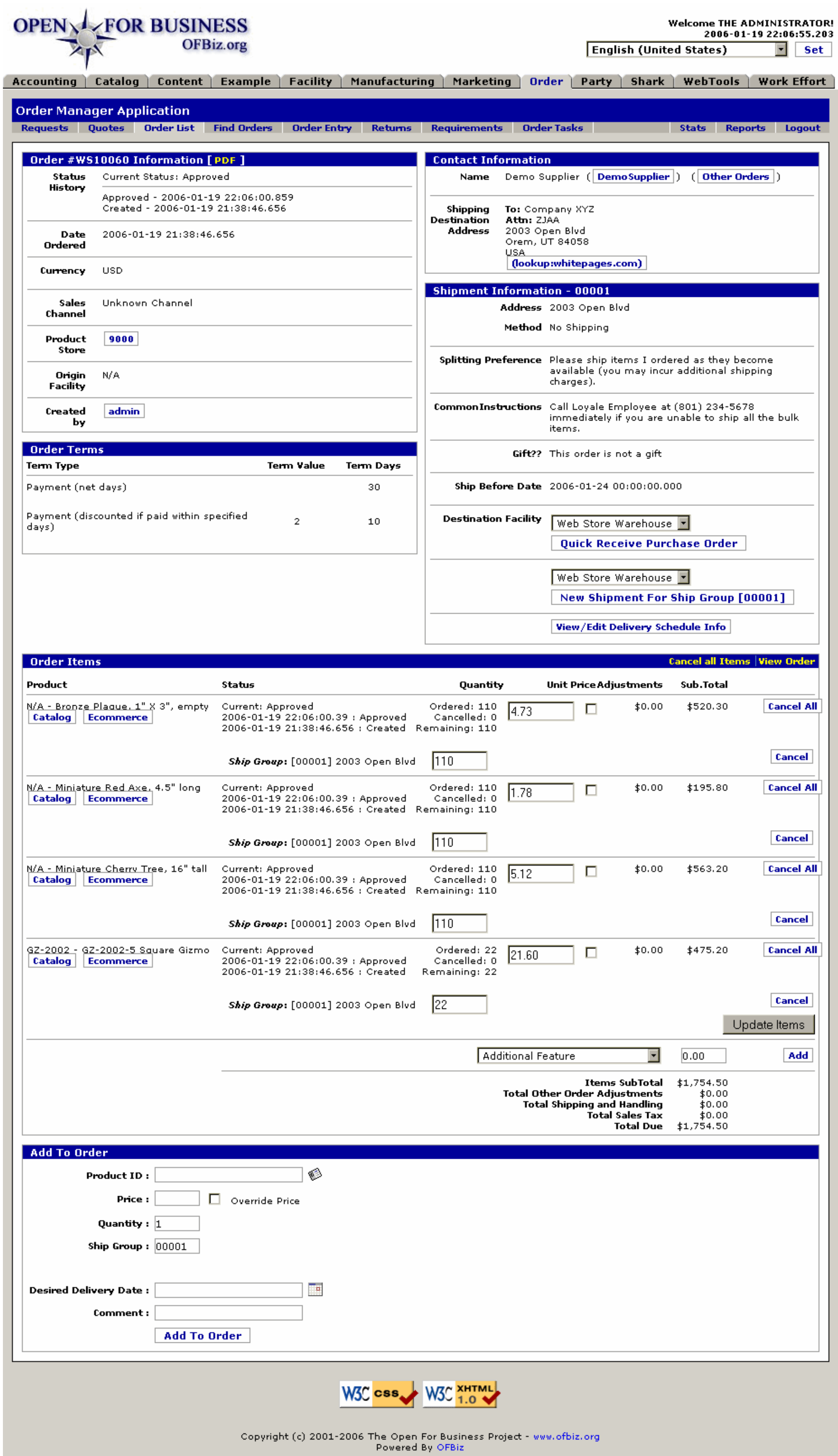
[Catalog] [Ecommerce] [Inventory] [(lookup:whitepages.com)] [Allow Split] [View/Edit Delivery Schedule Info] <B>[PDF] [Approve Order] [Edit Items] [Create New]</B>

.7.13.3 Discussion

The final step in the process is to have the Purchase Order approved. Approval is indicated to the system when an authorized party clicks on the Approve Order link near the top of the screen. After Approval, the link [Approve Order] will be gone.<P>If changes need to be made before approval, click on the [Edit Items] link. Once changes are made you will be returned to this screen.

.7.14 Edit Order Items

.7.14.1 editOrderItems-PO



After completion, before or after [Approve Order], a PO can be edited, modified or added to at this screen.

.7.14.2 link buttons

[Catalog] [Ecommerce] [Allow Split] [Other Orders] [(lookup:whitepages.com)] [Quick Receive Purchase Order] [New Shipment For Ship Group ...] [View/Edit Delivery Schedule Info] [Cancel All] [Cancel] [Update Items] [Add] [Add To Order] <B>[PDF] [Approve Order] [Cancel all Items] [View Order] [Create New]</B>

.7.14.3 Discussion

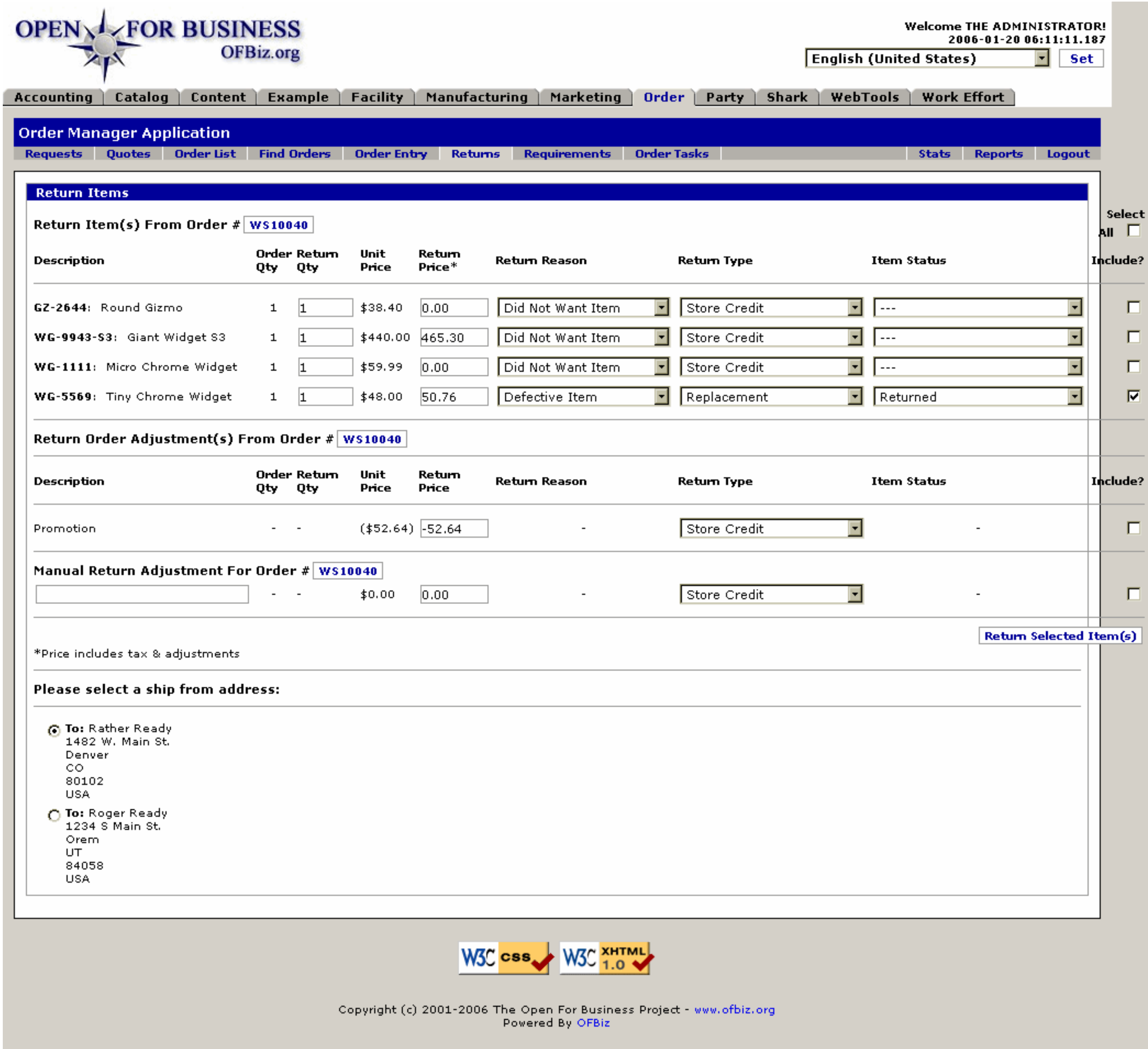
This screen will be somewhat different before and after [Approve Order] has been clicked. In either condition, [Edit Items] opens up the screen to editable fields for making changes. After any changes are made, be sure to click [Update Items] which will return you to the previous screen. <P> Note how additional items can be added to the Purchase Order, even after it has been approved. This is important when last minute communication with a Vendor allows you to quickly add to your earlier order. Use this section here to document those late additions.

.8 Returns

.8.1 Create Return from Order

.8.1.1 quickreturn

id:[13578] image:



When you choose to [Create Return] directly from an order, this "quickreturn" screen is presented. Check item(s) being returned.

.8.1.2 link buttons

[Return Selected Item(s)]

.8.1.3 Discussion

While viewing an existing order, you can create a return from that order by clicking on the [Create Return] button. That will take you to the quickreturn screen, shown above, from where you identify which item(s) the customers wants to return. <P> Be clear about the reason and the quantity to be returned. Also be sure that the Return Price does not exceed how much the customer actually paid for the item. Return Type is important because it is always to your advantage to have the purchase price applied as a credit towards another purchase rather than having to take money out of your business to pay a refund. <P> When the information is correctly selected and entered, click the link [Return Selected Items] to create the Return. That also takes you to the Returns tab, Return Items sub-tab, discussed further below.

.8.1.4 Return Items from Order ...

Click on the Order ID to be taken to the View Order screen.

.8.1.5 Select All (check box)

If the party wishes to return all of the items in the order, click on this check box.

.8.1.6 Description

Product ID and name of the product in the order being considered for return.

.8.1.7 Order Qty

How many were shipped with the order.

.8.1.8 Return Qty

How many the customer would like to return. <P> Be sure this does not exceed the Order Qty. If that attempt is made, have them return any surplus against another order from where they probably obtained it.

.8.1.9 Unit Price

What was paid for the item when purchased under this Sales Order.

.8.1.10 Return Price *

The Price at which the customer will be credited. This is a mandatory field (*). <P> For example, if the customer received a promotional discount of 10% on a $100 item, you would not return $100 (the Unit Price) but only the discounted price of $90 which they originally paid for it.

.8.1.11 Return Reason (drop-down box)

Select the best-stated reason for the return. Remember that Returns need to be approved. Some items may be sold with a re-shelving fee, others may be close-outs with no returns authorized.
 Choices in the drop-down box might include: <P><B> Defective Item
 Did Not Want Item
 Mis-Shipped Item
 Digital Fulfillment Failed</B>

.8.1.12 Return Type (drop-down box)

This establishes how the financial aspects of the return will be handled. Choices in the drop-down box might include:<P><B> Store Credit
 Refund
 Replacement
 Cross-Ship Replacement</B>

.8.1.13 Item Status (drop-down box)

What is the current status of the Item? The status could be one of the following:
<B> --- </B> - the item status is unknown
<B> On Order </B> - the item was not yet shipped but is no longer wanted
<B> Available </B> - the item is in your facility
<B> Promised </B> - the item is committed to fulfilling another order
<B> Delivered </B> - the item is on its way to the Customer now wanting to return it
<B> Being Transferred </B> - the item is being moved from one location or section to another
<B> Being Transferred (Promised) </B> - the item is being moved AND it has already been committed to fulfilling another order
<B> Returned </B> - the item has physically been sent back from the customer to your facilities
<B> Defective </B> - whatever the location or other status may be, the item itself is considered defective and should not be promised to fulfill another order.

.8.1.14 Include? (check box)

Check this box to the side of each item being returned; leave blank of an item is not being returned.

.8.1.15 Select a ship from address (radio buttons)

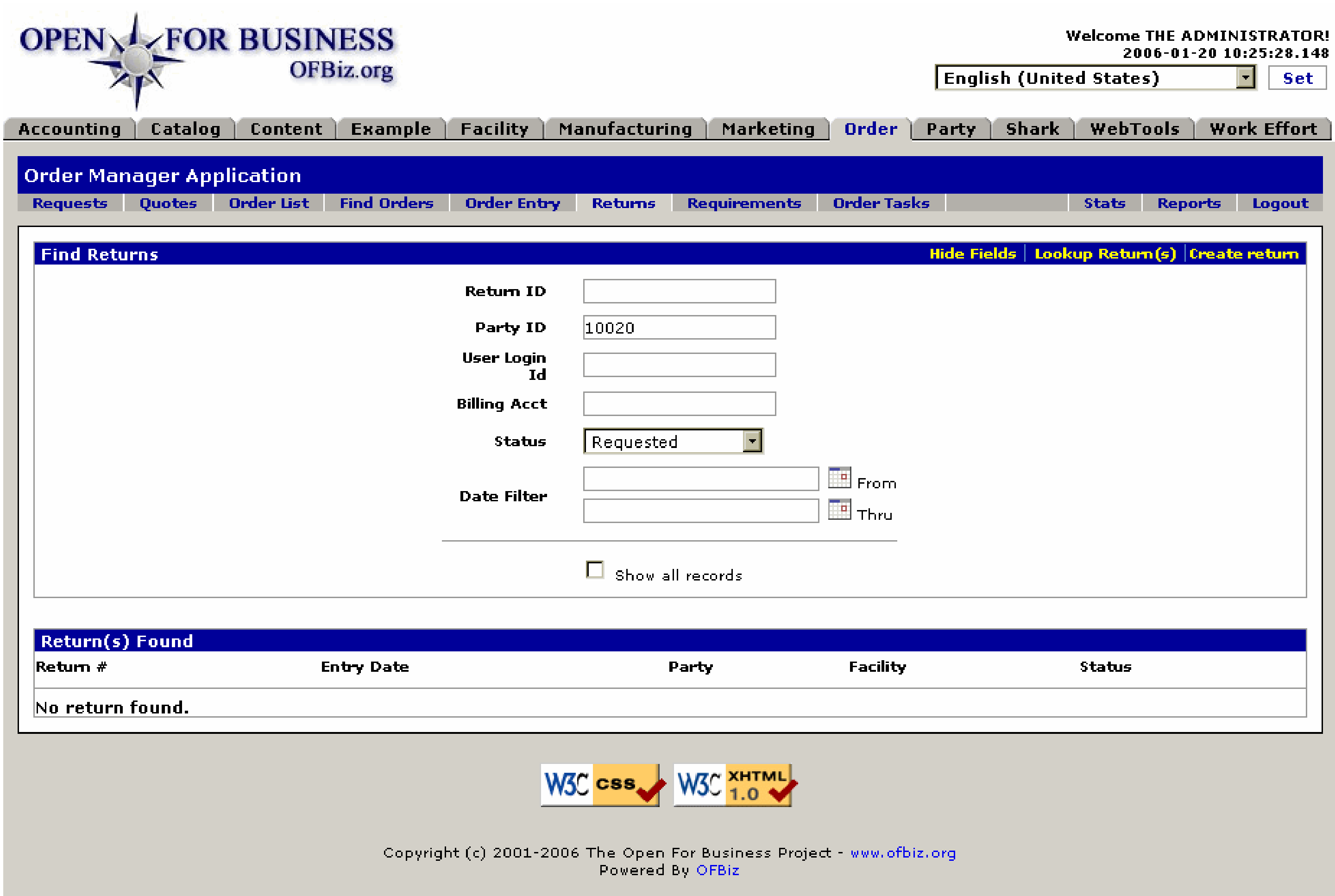
Click on the radio button corresponding with the address from which the items will be returned. This will generally match the ship-to address for the original Sales Order.

.8.1.16 Return Selected Items - successful

id:[13592] image:

Successfully created Return, discussed elsewhere. [Accept Return] to proceed.

.8.2 findreturn



The first screen under the Returns tab. Enter search parameters, then [Lookup Return(s)], or click to [Create Return].

.8.3 link buttons

[Show all records] <B>[Show / Hide Fields] [Lookup Return(s)] [Create return]</B>

.8.4 Search parameters

.8.4.1 Return ID

If you already know the Return ID, enter the ID number here to access the Return document.

.8.4.2 Party ID

The Party which placed the order against which the Return was created.

.8.4.3 UserLogin ID

The login ID of the Party which requested the creation of the Return.

.8.4.4 Billing Acct

If the Return was against a Billing Account, what is the Account number of that account.

.8.4.5 Status (drop-down box)

Default listings include: <B><p> Any return status
 Requested
 Accepted
 Received
 Completed
 Cancelled </B>

.8.4.6 Date Filter (popup calendars)

Popup calendars for From and Thru dates.

.8.4.7 Show All Records (checkbox)

A click on this link will return all existing returns, subject to the parameters entered. If all fields are blank, every Return will be listed.

.8.5 Create New Return

.8.5.1 returnMain-New

id:[DOCORD688] image:

If you are not starting from a View Order screen, you can initiate the creation of a new Return from this screen.

.8.5.2 link buttons

[Create New]

.8.5.3 Currency (drop-down box)

Select the type of currency which formed the basis of the original order; you will need to maintain that currency through the return.

.8.5.4 Entry Date (popup calendar)

Defaults to Now. Enter the event date if this is a followup to an off-line transaction.

.8.5.5 Return From Party

Enter the Party ID of the one returning items from his previously fulfilled order.

.8.5.6 Return To Facility (drop-down box)

Generally this would be the facility which originally shipped the items to the party.

.8.5.7 Billing Account

If one exists, record the number now.

.8.5.8 Needs Auto-Receive (Y/N)

Needs Auto-Receive (On ACCEPT) means that the item is already here and that when the Return is Accepted, it will be processed as an Auto Receive rather than through the normal steps in the facility.

.8.5.9 Return Created

.8.5.9.1 createReturn

id:[12896] image:

When a new Return is created, this screen confirms the creation with a new Return number.

.8.5.9.2 link buttons

[PDF] [Update] <B>[Return Header] [Return Items] </B>

.8.5.9.3 Discussion

This screen is very similar to the View/Edit screen presented below. See <B>View/Edit Returns</B> for further details.

.8.6 Return(s) found

.8.6.1 findreturn-showall

id:[DOCORD638] image:

All returns meeting the entered parameters are shown. Click on the Return ID or [View] to proceed.

.8.6.2 link buttons

[View] [Show / Hide Lookup Fields] [Previous] [Next]

.8.6.3 Return

Click on this number or on the associated [View] link button to view details of the Return. At that screen you can take the next steps to process the Return.

.8.6.4 Entry Date

Date the return was created.

.8.6.5 Party

Click on the Party ID to view details about the Party.

.8.6.6 Facility

Where the items are to be returned.

.8.6.7 Status

The Status of where this return is in the system.

.8.7 View/Edit Return

.8.7.1 Return Header

.8.7.1.1 returnMain-found

id:[DOCORD646] image:

The Header or key elements of the Return are shown here. Return Items are viewed and selected under the Return Items tab.

.8.7.1.2 link buttons

[PDF] [Update] <B> [Return Header] [Return Items] [Receive Return]</B>

.8.7.1.3 Discussion

The Return process involves a coordinated effort with Facilities, Accounting, and the Order managers. The tab <B>[Receive Return]</B> is not visible on this screen until the Return has been Accepted. That tab actually takes you into the Facilities Manager for further processing of the Return.

.8.7.1.4 Return ID

This is a number assigned by the system when the Return is first requested.

.8.7.1.5 Currency

The national currency in which the Order and the Return are based.

.8.7.1.6 Entry Date (popup Calendar)

If the date of creation for the return documentation was different from the date of the event, you can change it using the drop-down calendar.

.8.7.1.7 Return from Party

Enter the Party ID for the party returning the item to you.

.8.7.1.8 Return to Facility (drop-down box)

Of the facilities you represent, which one will be receiving the returned item?

.8.7.1.9 Billing Account

If an account exists for billing the Party, this is the account number.

.8.7.1.10 Needs Auto-Receive (Y/N)

Needs Auto-Receive (On ACCEPT) means that the item is already here and that when the Return is Accepted, it will be processed as an Auto Receive rather than through the normal steps in the facility.

.8.7.1.11 Return Status (drop-down box)

Depending upon the progress through the system, Status could be selected from among the following: <B><P> Requested
 Accepted
 Canceled
 Received
 Completed</B>

.8.7.1.12 Created By

The party that took the steps to create this documentation of the return.

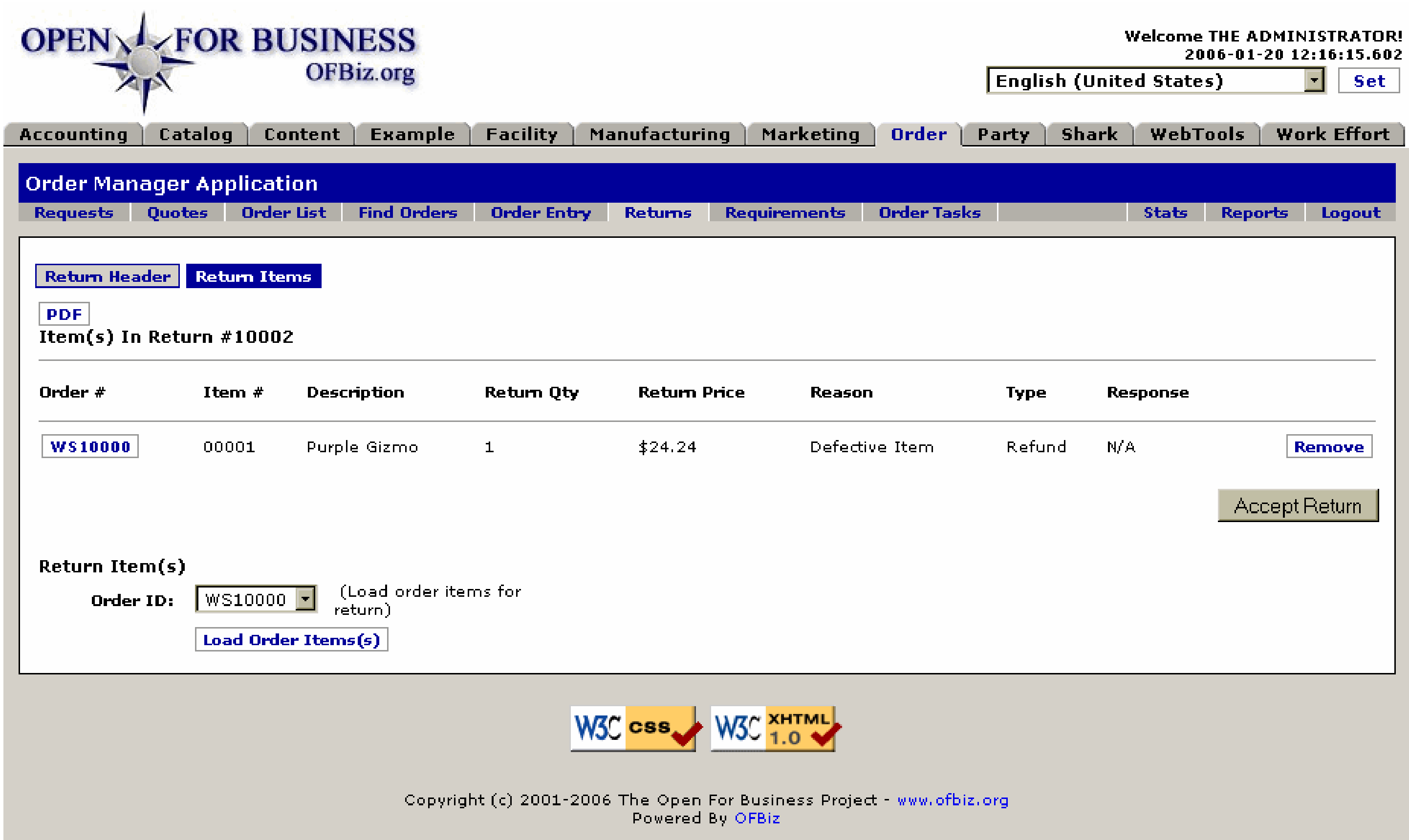
.8.7.1.13 Return From Address

Radio buttons; choose one. If the Party has multiple addresses associated with his ID, select the one from which the items will be returned. If the customer is a walk-in, there might not be an associated address.

.8.7.2 Return Items

.8.7.2.1 returnItems

id:[DOCORD656] image:



Select the Order ID then click on [Load Order Items] if they are not yet displayed in the table; remove any not being returned.

.8.7.2.2 link buttons

[PDF] [Load Order Items]<B> [Return Header] [Return Items] [Receive Return]</B>

.8.7.2.3 Order

Click on the Order ID to view the entire order.

.8.7.2.4 Item

Each order has one or more Items; this is the Item number from which part or all of the quantity will be returned.

.8.7.2.5 Description

Generally the Product ID and/or product name.

.8.7.2.6 Return Qty

How many are being returned.

.8.7.2.7 Return Price

This represents how much credit will return to the customer with this return.

.8.7.2.8 Reason

Why was the return requested?

.8.7.2.9 Type

Whether the customer wants a refund of his cash, a credit to order something else, a replacement of the same item, etc.

.8.7.2.10 Response

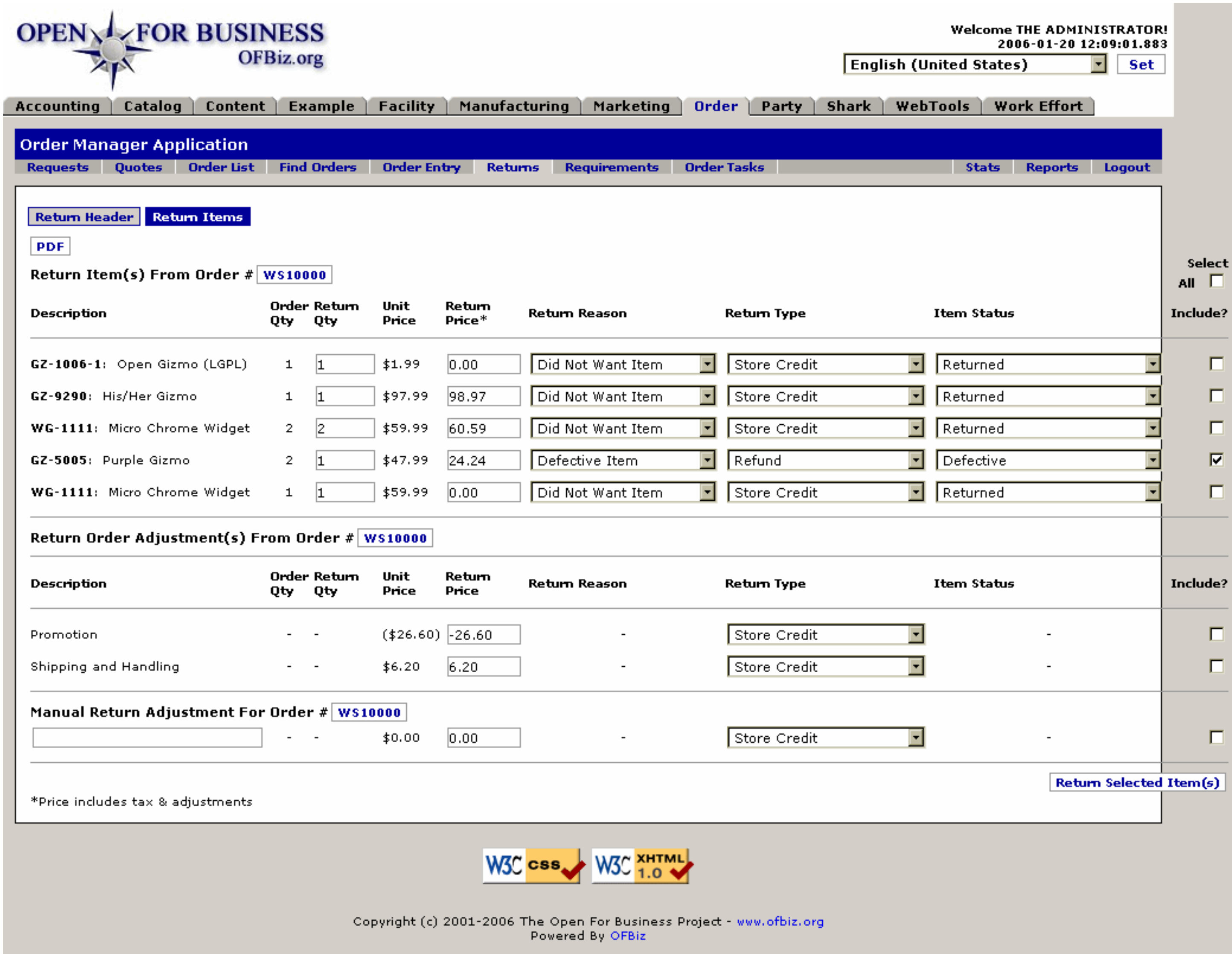
Reserved.

.8.7.2.11 Return Item(s) (drop-down box)

Select the Order Number then click on 'Load Order Item(s).' The Loading Tool discussed below will present a working screen based upon the items ordered.

.8.7.2.12 Return Items Loading tool

.8.7.2.12.1 returnItems-loaded



The check mark in the RH column is all important; only checked items are being returned.

.8.7.2.12.2 link buttons

[Return Selected Items] [PDF] <B>[Return Header] [Return Items] </B>

.8.7.2.12.3 Description

This column is populated from the original order with the ID and Description of each item that can be returned.

.8.7.2.12.4 Order Qty

Shows the quantity ordered.

.8.7.2.12.5 Return Qty

Enter the number of units to be returned by the customer. <P> Automatically populated with the maximum number of units that can be returned; already adjusted to reflect items previously returned. Therefore, reduce the number to indicate the actual quantity being returned.

.8.7.2.12.6 Unit Price

The price at which the product was sold.

.8.7.2.12.7 Return Price

1. Must be specified.
2. Includes tax and adjustments.
3. This is the price amount which will be credited back to the customer. It may be different from the Unit Price because of promotional discounts, interim price changes, etc.

.8.7.2.12.8 Return Reason (drop-down box)

Select from the list of acceptable reasons.

.8.7.2.12.8.1 If reason not listed ...

Additional reasons can be programmed into the system as their need develops.

.8.7.2.12.8.2 Why is a reason needed?

This information is used when receiving the return to help decide whether to put the item back into inventory, throw it out, schedule it for repairs, etc.

.8.7.2.12.9 Return Type (drop-down box)

How will this be made right for the customer? Select from the list of ways this return will be credited to the customer - as a store credit, a replacement unit, etc.

.8.7.2.12.10 Return Status (drop-down box)

What is the current status of the Item? The status could be one of the following:
<B> --- </B> - the item status is unknown
<B> On Order </B> - the item was not yet shipped but is no longer wanted
<B> Available </B> - the item is in your facility
<B> Promised </B> - the item is committed to fulfilling another order
<B> Delivered </B> - the item is on its way to the Customer now wanting to return it
<B> Being Transferred </B> - the item is being moved from one location or section to another
<B> Being Transferred (Promised) </B> - the item is being moved AND it has already been committed to fulfilling another order
<B> Returned </B> - the item has physically been sent back from the customer to your facilities
<B> Defective </B> - whatever the location or other status may be, the item itself is considered defective and should not be promised to fulfill another order.

.8.7.2.12.11 Select for return (All)

Check the box associated with each line that has product for return. If All, check the box above the column.

.8.7.2.12.12 Return Selected Items

Click on this after the work screen is correctly completed to process the return. This screen will not be available again, so be sure that all selections are correct. If you need to make additional returns later against the same order, create a new Return.

.8.7.2.13 ReturnItems-Accepted

.8.7.2.13.1 ReturnItems-Accepted

After loading items, update Status to Accepted under Return Header; that will bring out the [Receive Return] tab for you.

.8.7.2.13.2 link buttons

[PDF] <B>[Return Header] [Return Items] [Receive Return] </B>

.8.7.2.13.3 Discussion

At this point you have identified the items for return, updated the Status to Approved at the Return Header screen, and returned to this Return Items screen to confirm that everything is correct. All of the fields have already been discussed above.<P> From this point you now have a new link button - <B>[Receive Return].</B> When you click on that, you are taken to the Facility Manager > Facilities tab > Receive Return sub-tab, shown below.

.8.7.3 Receive Return

.8.7.3.1 receiveReturn

Returned items are "received" in the Facility Manager, at the Facilities tab > Receive Return sub-tab.

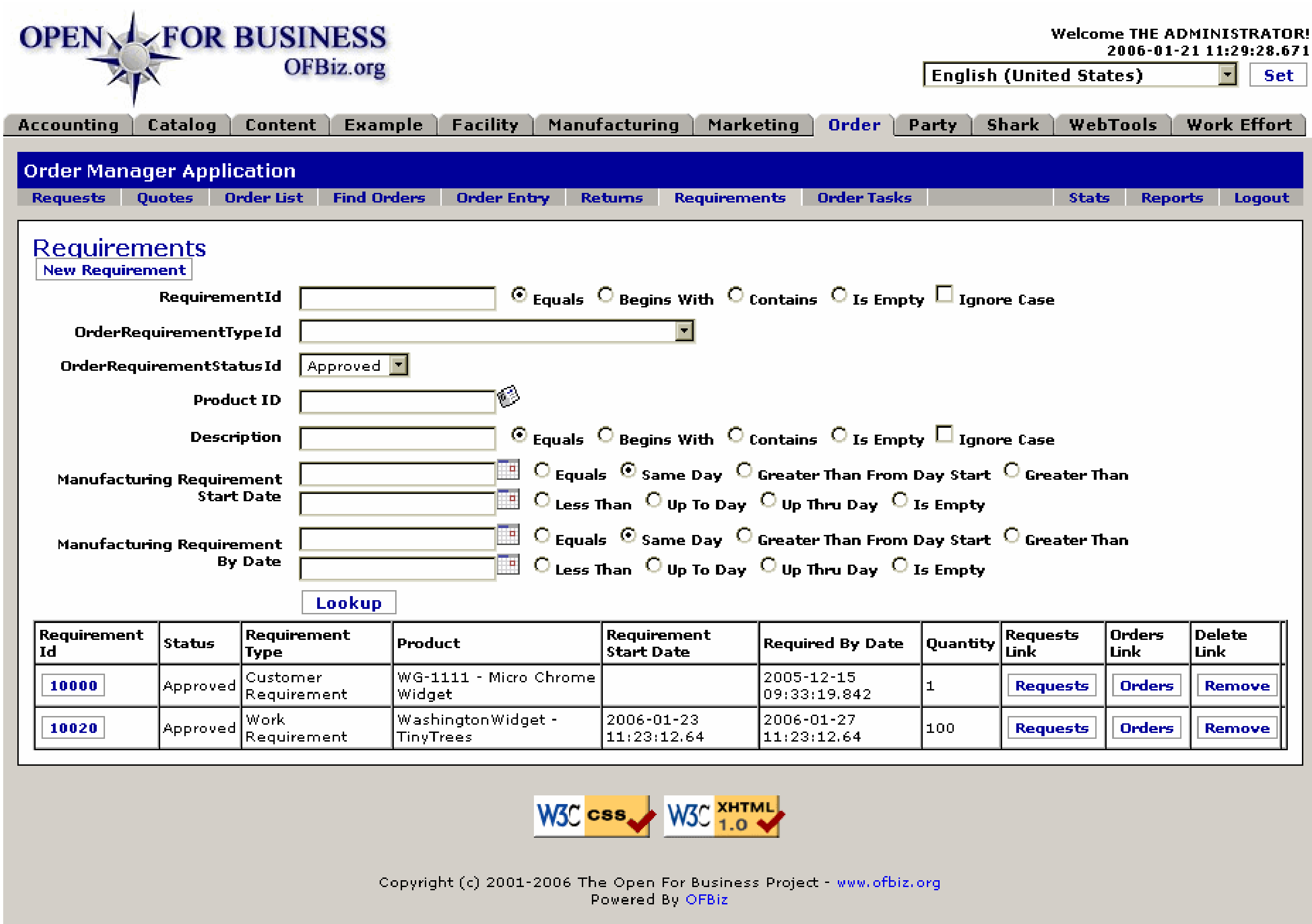
.8.7.3.2 Discussion

Subsequent steps in the Returns process are discussed in the Facility Manager > Facilities tab > Receive Return sub tab. <P><B> IMPORTANT: </B>What the customer needs from you at this point are three pieces of information to include on the <u>outside</u> of the package he is returning:
 (1) His original Order Number.
 (2) This Return Number (shown in the screen above after the words 'Receive Return' and highlighted inside the link box).
 (3) The exact Return Address where you want him to return the item(s). <i>That may be different from the address shown on the package he received. </i> <P> They should keep this information available for themselves in case they need to call back to check on the status of their return.

.9 Requirements

.9.1 FindRequirements

id:[12908] image:



Use the search tool to specify the Requirement by ID or to reduce the volume of Requirements shown in the table of search hits.

.9.2 link buttons

[New Requirement] [Lookup] [Requests] [Orders] [Remove]

.9.3 Search Tool

.9.3.1 Requirement ID

Select appropriate radio button: Equals / Begins With / Contains / Is Empty
 Check box if appropriate: Ignore Case

.9.3.2 OrderRequirementType ID (drop-down box)

Select from the drop-down box, only if you are sure of the type. Entering incorrectly will prevent the 'hit' on the one you want.

.9.3.3 OrderRequirementStatus ID (drop-down box)

Select from the drop-down box. If unsure, leave blank because any inaccurate item will prevent a good hit. <P> Choices might include:
 <B> ---
 Approved
 Created
 Ordered
 Rejected </B>

.9.3.4 Product ID (popup search tool)

If you know the subject Product ID, you could search on that piece here.

.9.3.5 Description

This is a tough pathway to search on. Whatever you enter needs to be included within the Description exactly as you enter it for you to obtain a hit. <P> Select appropriate radio button: Equals / Begins With / Contains / Is Empty
 Check box if appropriate: Ignore Case

.9.3.6 Manufacturing Requirement Start Date (popup calendars)

Using the popup calendars, enter two dates to bracket the date.
Select from these radio buttons for the top date: Equals / Same Day / Greater Than From Day Start / Greater Than.
 Select from these radio buttons for the bottom date: Less Than / Up To Day / Up Thru Day / Is Empty.

.9.3.7 Manufacturing Requirement By Date (popup calendars)

Using the popup calendars, enter two dates to bracket the date.
Select from these radio buttons for the top date: Equals / Same Day / Greater Than From Day Start / Greater Than.
 Select from these radio buttons for the bottom date: Less Than / Up To Day / Up Thru Day / Is Empty.

.9.4 Table of Requirements

.9.4.1 Discussion

The results of your search are displayed in this table. If there are too many hits in the table to allow quick discovery of the Requirement you seek, enter another parameter or two into the search and you should have fewer presented. <P> Several of the columns have link items, discussed below. The other columns in the table include:
 <B> Status
 Requirement Type
 Product
 Requirement Start Date
 Required By Date
 Quantity</B>

.9.4.2 Requirement ID

Click on this linked Requirement ID number to be taken to the Requirements Tab > EditRequirement screen where you can view and update the details about the requirement as well as tab into other screens.

.9.4.3 Requests Link

Click on the [Requests] link associated with the Requirement to see what Request might have led to this Requirement.

.9.4.4 Orders Link

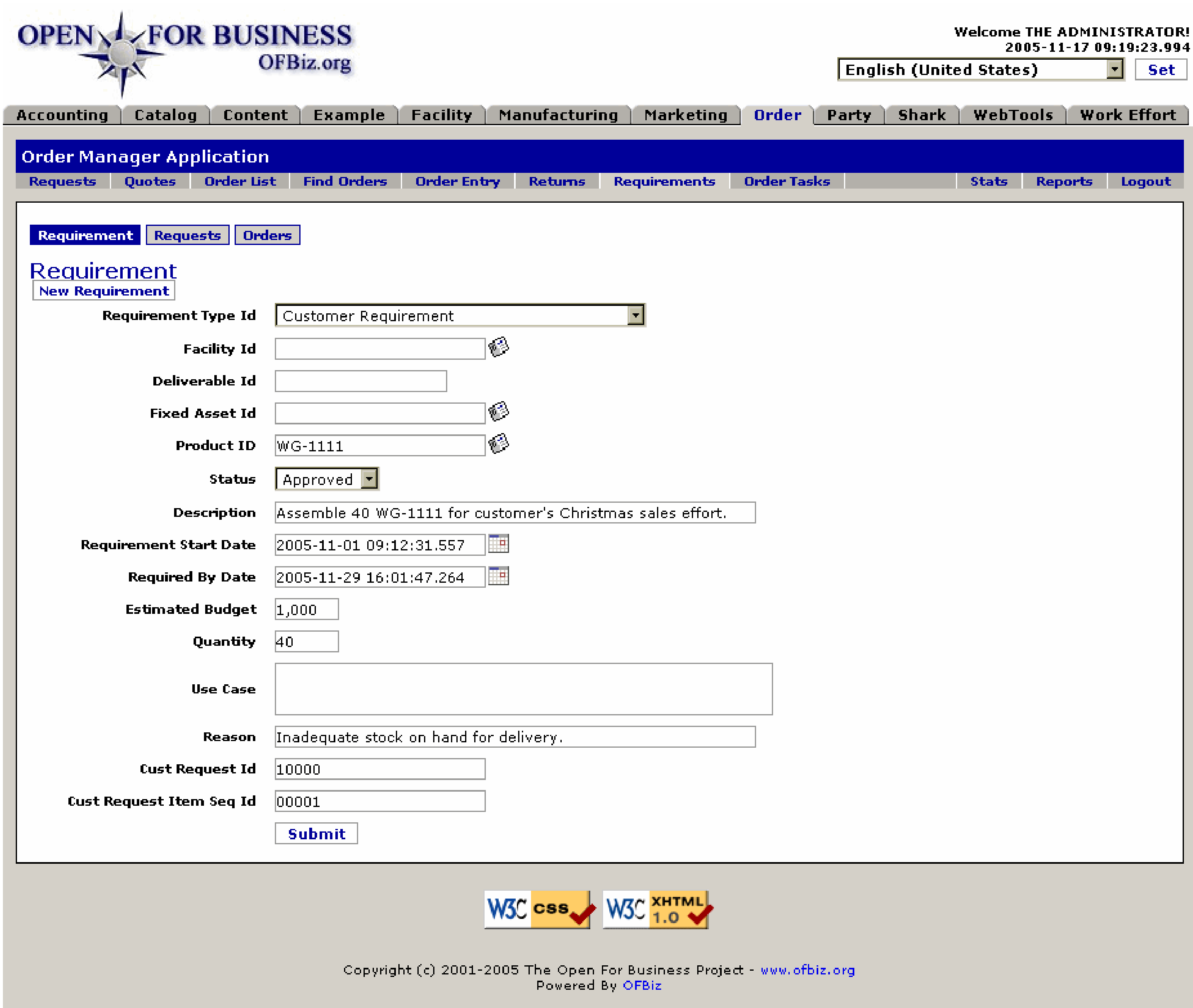
Click on the [Orders] link associated with the Requirement to see what Order might have led to this Requirement.

.9.4.5 Delete Link

Click on [Remove] to delete this Requirement.

.9.5 Edit Requirement

.9.5.1 editRequirement



Enter all the new or additional details of this Requirement, then click [Submit].

.9.5.2 link buttons

[New Requirement] [Submit] <B> [Requirement] [Requests] [Orders] </B>

.9.5.3 Requirement Type ID (drop-down box)

Select from among these kinds of Types: <P><B> ProductionRun proposed by the MRP process
 Purchase Order proposed by the MRP process
 Customer Requirement
 Internal Requirement
 Product Requirement
 Work Requirement</B>

.9.5.4 Facility ID (popup search tool)

Use the popup search tool to specify which of your facilities will be doing the work to fulfill the Requirement.

.9.5.5 Deliverable ID

If the Requirement asks for a Deliverable item (other than or in addition to an established company Product), this will be the identity to associate with the Deliverable upon delivery.

.9.5.6 Fixed Asset ID (popup search tool)

Use the popup to specify which Fixed Asset may be assigned to perform effort under this Requirment.

.9.5.7 Product ID (popup search tool)

Use the popup to specify which Product is the subject of this Requirement.

.9.5.8 Status (drop-down box)

Status selected from the drop-down box might include: <P><B> ---
 Created
 Approved
 Ordered
 Rejected</B>

.9.5.9 Description

What is being sought in this Requirement?

.9.5.10 Requirement Start Date (popup calendar)

When did action on this Requirement (including this documentation) actually begin?

.9.5.11 Required By Date (popup calendar)

When must the efforts of this Requirement be completed.

.9.5.12 Estimated Budget

In units of currency, what is the total amount of funds estimated to complete this Requirement?

.9.5.13 Quantity

How many of a product, man-hours of effort, copies of a deliverable, etc., are needed to fulfill this Requirement?

.9.5.14 Use Case

Complete as appropriate. The 'Use Case' concept is a specific tool in the production world.

.9.5.15 Reason

Unlike Description which spells at the 'What' for this Requirement, here you may enter the 'Why' or the reasons this Requirement is needed.

.9.5.16 Created Date (popup calendar)

Note: This does NOT automatically populate, so you should record the date when the Requirement is created.

.9.5.17 Created By User Login

Login ID of the party that created the Requirement.

.9.5.18 Last Modified Date (popup calendar)

Note: This does NOT automatically update, so you should record the date each time the Requirement is edited.

.9.5.19 Last Modified By User Login

Note: This does NOT automatically update, so you should record your ID each time the Requirement is edited.

.9.5.20 Cust Request ID

If this Requirement is associated with a Customer Request, enter that ID here.

.9.5.21 Cust Request Item Seq Id

As a Request may generate multiple Requirements, here you identify which Item Sequence in the Request led to this one.

.9.5.22 New Requirement

The screen for creating a New Requirement is identical to this screen but it appears with all fields empty except default drop-down items.

.9.6 Requests tab

.9.6.1 ListRequirement CustRequests

id:[12950] image:

Either click on the Cust Request ID or the Cust Request Item Seq ID.

.9.6.2 link buttons

<B> [Requirement] [Requests] </B>

.9.6.3 Cust Request ID

This ID is a link to the Customer Request under the Order Manager >> Requests tab >> Request sub-tab.

.9.6.4 Cust Request Item Seq Id

This ID is a link to the line item or Sequence ID number of the original Request in the Order Manager > Requests tab > Order Item sub-tab.

.9.7 Orders tab

To be completed.

.10 Order Tasks

.10.1 Discussion

Returns you to the Order List tab with any currently assigned order tasks gathered into the table for you.

.10.2 Tasklist

id:[14084] image:

If the Party currently logged in has any pending tasks to perform with existing Orders, this list appears. Click the order number.

.10.3 link buttons

[Schedule Delivery]

.10.4 Order Number

Click on this number to bring up the Sales Order or Purchase Order needing your attention.

.10.5 Name

Name of the task, if any.

.10.6 Order Date

Date the Order was placed.

.10.7 Status

Status of the Order: has it been Approved yet?

.10.8 Items

Which Items in the Order need to be attended to.

.10.9 Total

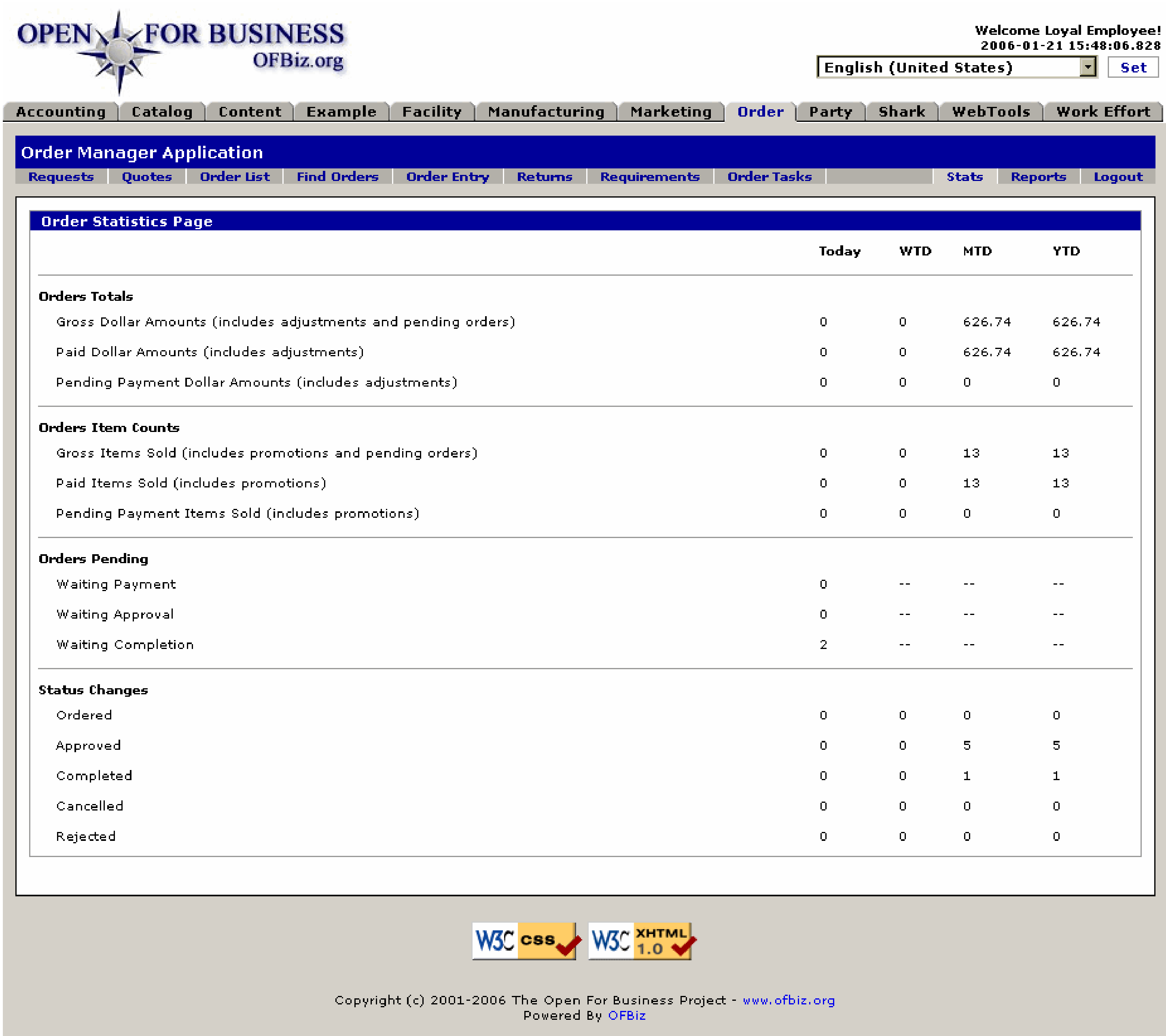
The value of the Order.

.11 Stats

Order Statistics page, presented in columns for Today | WTD | MTD | YTD

.11.1 orderstats

id:[DOCORD696] image:



OPEN FOR BUSINESS OFBiz.org

Welcome Loyal Employee!
2006-01-21 15:48:06.828
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

Order Statistics Page

	Today	WTD	MTD	YTD
Orders Totals				
Gross Dollar Amounts (includes adjustments and pending orders)	0	0	626.74	626.74
Paid Dollar Amounts (includes adjustments)	0	0	626.74	626.74
Pending Payment Dollar Amounts (includes adjustments)	0	0	0	0
Orders Item Counts				
Gross Items Sold (includes promotions and pending orders)	0	0	13	13
Paid Items Sold (includes promotions)	0	0	13	13
Pending Payment Items Sold (includes promotions)	0	0	0	0
Orders Pending				
Waiting Payment	0	--	--	--
Waiting Approval	0	--	--	--
Waiting Completion	2	--	--	--
Status Changes				
Ordered	0	0	0	0
Approved	0	0	5	5
Completed	0	0	1	1
Cancelled	0	0	0	0
Rejected	0	0	0	0

W3C CSS W3C XHTML 1.0

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Although the numbers are not typical, this is a typical screen showing Order Statistics for the periods of time.

.11.2 link buttons

(none)

.11.3 Orders Totals

.11.3.1 Gross Dollar Amounts

Total volume (in your currency) of all the orders placed in each of the categories: Today, this week, this month, and this year.

.11.3.2 Paid Dollar Amounts

How much money, in your currency, has been received from all sales in the 4 given time periods.

.11.3.3 Pending Payment Dollar Amounts

How much money is still to be received from orders accepted but not yet paid for or not yet shipped. The total of this plus the Paid Dollar Amounts should equal the Gross Dollar Amounts after adjustments.

.11.4 Orders Item Counts

.11.4.1 Gross Items Sold

Total of all the number of units of sale, as sold in each of the 4 time periods.

.11.4.2 Paid Items Sold

Total of the number of units of sale for which payment has been made, in each of the 4 time periods.

.11.4.3 Pending Payment Items Sold

Total of all the number of units of sale for which payment has not been received in each of the 4 time periods.

.11.5 Orders Pending

.11.5.1 Waiting Payment

Concerned only with today, reports the status of orders which have been completed but not yet paid for.

.11.5.2 Waiting Approval

Reports the status of orders which have been submitted by customers but for whatever reason have not yet been approved.

.11.5.3 Waiting Completion

Reports the status of orders which have been approved but not yet processed through the system yet.

.11.6 Status Changes

.11.6.1 Ordered

Reports the number of orders which remain at the Ordered status level since their creation, whether that be today, a week ago, a month ago, or a year ago.

.11.6.2 Approved

Reports the number of orders which still remain at the Approved status level since their Approval, whether that be today, a week ago, a month ago, or a year ago.

.11.6.3 Completed

Reports the number of orders which have been completed since their creation, for today, a week ago, a month ago, and a year ago.

.11.6.4 Cancelled

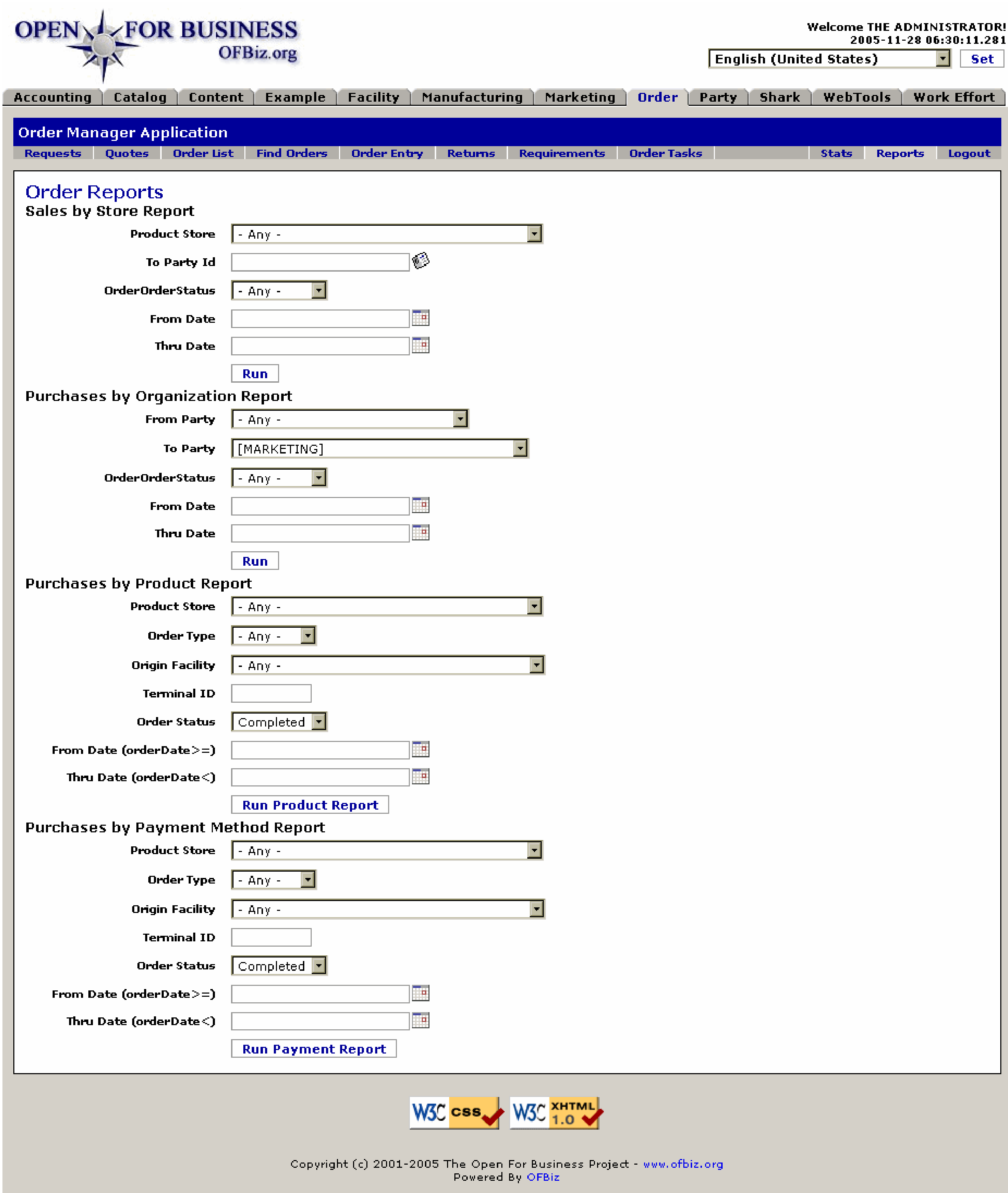
Any orders whose status was changed to Cancelled are reported here for the 4 time periods.

.11.6.5 Rejected

Total of Rejected orders for each of the 4 time periods.

.12 Reports

.12.1 OrderPurchaseReportOptions



Enter your parameters then select which Report you wish to [Run] by clicking that link.

.12.2 link buttons

[Run] [RunProductReport] [RunPaymentReport]

.12.3 Sales by Store Report

.12.3.1 Product Store (drop-down box)

Let the report be for Any (meaning All), or select a specific store from the drop-down box.

.12.3.2 To Party ID (popup search tool)

Leave blank to report on all sales, or identify an ordering Party using the popup search tool.

.12.3.3 Order Status (drop-down box)

Leave blank or choose -Any- unless you wish to restrict the report to a specific status level. <P>Select from one of the follow Status levels: <B>
 -Any-
 Created
 Sent
 Processing
 Approved
 Completed
 Rejected
 Cancelled</B>

.12.3.4 From Date (popup calendar)

Limit the report to orders of the selected status as of this date forward.

.12.3.5 Thru Date (popup calendar)

Limit the report to orders of the selected status no later than this date and before.

.12.3.6 Sample Sales by Store Report

id:[13601] image:

Sales by Store Report

Order Status: Any

Store ID	Product	Qty Sold	Value Sold
9000	Big Gizmo (GZ-8544)	1	269.99
9000	Micro Chrome Widget (WG-1111)	8	359.94
9000	Open Gizmo (LGPL) (GZ-1006-1)	4	7.96
9000	Rainbow Gizmo (GZ-1004)	1	25.99
9000	Round Gizmo (GZ-2644)	2	38.4
9000	Square Gizmo (GZ-2002)	1	47.99

This report was quickly generated without limiting parameters.

.12.4 Purchases by Organization Report

.12.4.1 From Party (drop-down box)

Select from an established Vendor on the list.

.12.4.2 To Party (drop-down box)

Select which department or group within the company which would have made the purchases.

.12.4.3 Order Status (drop-down box)

Leave blank or choose -Any- unless you wish to restrict the report to a specific status level. <P>Select from one of the follow Status levels: <B>
 -Any-
 Created
 Sent
 Processing
 Approved
 Completed
 Rejected
 Cancelled</B>

.12.4.4 From Date (popup calendar)

Limit the report to orders of the selected status as of this date forward.

.12.4.5 Thru Date (popup calendar)

Limit the report to orders of the selected status no later than this date and before.

.12.4.6 Sample Purchases by Organization Report

id:[13608] image:

Sample report of product purchased by the company. Note that the total value is not shown.

.12.5 Purchases by Product Report

.12.5.1 Product Store (drop-down box)

Select from any of the Stores you maintain with OFBiz.

.12.5.2 Order Type (drop-down box)

Is this report for Purchase Orders or Sales Orders? Select from the drop-down box.

.12.5.3 Origin Facility (drop-down box)

Which facility did the order come through - a call center, the warehouse, the retail store, an ecommerce site, etc.

.12.5.4 Terminal ID

If you want to limit the report to one particular Terminal (register, sales agent, etc.), specify that here by ID.

.12.5.5 Order Status (drop-down box)

Leave blank or choose -Any- unless you wish to restrict the report to a specific status level. <P>Select from one of the follow Status levels: <B>
 -Any-
 Created
 Sent
 Processing
 Approved
 Completed
 Rejected
 Cancelled</B>

.12.5.6 From Date (popup calendar)

orderDate>= means that the Order Date is greater than or equal to the Date selected with the popup calendar.

.12.5.7 Thru Date (popup calendar)

orderDate< means that the Order Date is before the date selected with the popup calendar.

.12.5.8 Sample Purchases by Product Report

id:[12962] image:

Purchase by Product Summary

Store ID	Facility ID	Terminal ID	Status ID	Product ID	Product Name	Qty	Qty Cncld
9000			ORDER_C	GZ-1006-1	Open Gizmo (LGPL)	5	1
9000			ORDER_A	GZ-1006-1	Open Gizmo (LGPL)	1	
9000			ORDER_C	GZ-2002	Square Gizmo	1	
9000			ORDER_C	GZ-2002	Square Gizmo	2	
9000			ORDER_A	GZ-2002	Square Gizmo	1	
9000			ORDER_C	GZ-2644	Round Gizmo	1	
9000			ORDER_C	GZ-2644	Round Gizmo	1	
9000			ORDER_A	GZ-2644	Round Gizmo	1	
9000			ORDER_A	GZ-5005	Purple Gizmo	2	
9000			ORDER_A	GZ-7000	Massive Gizmo	1	
9000			ORDER_C	GZ-8544	Big Gizmo	2	
9000			ORDER_C	WG-1111	Micro Chrome Widget	1	
9000			ORDER_C	WG-1111	Micro Chrome Widget	3	1
9000			ORDER_C	WG-5569	Tiny Chrome Widget	2	
9000			ORDER_C	WG-5569	Tiny Chrome Widget	1	
9000			ORDER_C	WG-9943-S3	Giant Widget S3	1	

All of the Orders matching the selected Parameters are reported in this generated PDF format.

.12.6 Purchases by Payment Method Report

.12.6.1 Product Store (drop-down box)

Select from any of the Stores you maintain with OFBiz.

.12.6.2 Order Type (drop-down box)

Is this report for Purchase Orders or Sales Orders? Select from the drop-down box.

.12.6.3 Origin Facility (drop-down box)

Which facility did the order come through - a call center, the warehouse, the retail store, an ecommerce site, etc.

.12.6.4 Terminal ID

If you wished to limit the report to one particular Terminal (register, sales agent, etc.), specify that here by ID.

.12.6.5 Order Status (drop-down box)

Leave blank or choose -Any- unless you wish to restrict the report to a specific status level. <P>Select from one of the follow Status levels: <B>
 -Any-
 Created
 Sent
 Processing
 Approved
 Completed
 Rejected
 Cancelled</B>

.12.6.6 From Date (popup Calendar)

orderDate>= means that the Order Date is greater than or equal to the Date selected with the popup calendar.

.12.6.7 Thru Date (popup Calendar)

orderDate< means that the Order Date is before the date selected with the popup calendar.

.12.6.8 Sample Purchases by Payment Method Report

id:[12967] image:

Purchase by Product Summary

Store ID	Facility ID	Terminal ID	Status ID	Payment Method	Amount
9000			ORDER_COMPLETED	Credit Card	
9000			ORDER_APPROVED	Credit Card	
9000			ORDER_COMPLETED	Offline Payment	
9000			ORDER_COMPLETED	Offline Payment	

Since no money actually was received, the amount remains empty in this demo.