Order Entry I Virtual Class

1) **Navigation in Order Entry**
2) Placing an Order - **Action Code: Order**
   a) **Customer Information in the Global Tab**
      i) *Select customer* by entering Name, Account number, Phone number, or Account number with Department or use the query feature and select from the list
      ii) *Select pay code:* Pay code will default to Charge, Cash or C.O.D. according to the customer status and/or PO Required field ($ for Cash only). Pay code can be changed per order if needed.
      iii) *Enter ship-to address* or query on multiple ship-to addresses and select from the list for this order.
      iv) *Locate A/R and Pricing information* as determined in the customer record.
      v) *Enter salesperson*, accept default salesperson or query and select a salesperson from the list for this order.
      vi) *Enter short or extended PO number* for the customer if needed.
         (1) If the customer record is set to require a PO and you skip this field, a box will pop up requesting the information before allowing items to be entered on an order.
         (2) Short PO is 10 characters (alphanumeric), Extended PO is 25 characters
      vii) If *Past Due Days* is set in the Order Entry parameters (LG0) and the customer has a past due balance the system will display the Past Due balance and prompt with the option to continue or cancel.
      viii) Attention
      ix) Who Called
   b) **Order Settings** (F6, or click Order Entry, Global, Order Settings)
      i) Order settings apply to current order only.
      ii) Who Called
      iii) National Drop Ship Order
      iv) Exclude from Summary Invoice
      v) Exclude from Customer Budgets
      vi) Print in Sequence Order
      vii) Invoice date
      viii) Due Date
      ix) Taxable
      x) District
      xi) Secondary Salesperson
      xii) Contracts
      xiii) Discount Type/Percent%

xiv) Price Breaks
xv) LABELZ Special Text

c) **Item Detail** (F3)
   i) *Laundry List* – If a laundry list id is set in the customer record, the Laundry List screen will pop up for item selection.
   ii) *View* – Cost fields, Item Info fields, Quantity Breaks, Item Aux, and Vendor Info can be turned on or off in the View Option by clicking each. Availability of the options will be dependent on the functionality assigned to the Order Writer in the Salesperson database.
   iii) *Enter items* -Individual items can be entered by querying, entering the item number, the item company, and/or the item description.
      (1) If Auto-query is turned on in the LG5 a list of items will appear on the screen once information has been entered.
      (2) Select the item from the queried list.
      (3) Items with an alternate code in the item record will open a new window with alternate item information dependent on the alternate code.
   iv) Enter the *order quantity*
   v) If parameters and security settings permit, item cost and pricing can be changed.
   vi) *Shipped quantity* may increase based on the on hand quantities and parameters or can be manually changed.
   vii) *Item settings* can be changed for individual items (Click Order Entry in the top menu, then Item, then Item Settings)
      (1) Taxable
      (2) Tax District
      (3) Commission Code
      (4) Exclude from Automated Short Buy
   viii) *Un-catalog* an item by right clicking and selecting Un-catalog
   ix) *Order Notes* are accessed by right clicking in the item number field, the Order Notes button, the Order Entry menu, or F11
      (1) *Start of Order* Note prints at the start of the order before the items
         (a) Normal – prints on tickets and invoices
         (b) S/B – prints on the Short Buy only
         (c) P/O – prints on the Purchase Order only
         (d) B/O – prints on the backorder only
      (2) *Line Item* Note is attached to an individual line item
         (a) Normal – prints on tickets and invoices
         (b) S/B – prints on the Short Buy only
         (c) P/O – prints on the Purchase Order only
         (d) B/O – prints on the backorder only
      (3) *End of Order* Note prints at the end of an order after the items
         (a) Normal – prints on tickets and invoices

(b) S/B – prints on the Short Buy only
(c) P/O – prints on the Purchase Order only
(d) B/O – prints on the backorder only

x)

d) **Order Totals** (F4)
   i) *Ordered Totals*
      (1) Subtotal
      (2) Discount
      (3) Tax
      (4) Total
   ii) *Shipped Totals*
      (1) Subtotal
      (2) Discount
      (3) Tax
      (4) Total
   iii) *Print options*
   iv) *Ending order status*
   v) *End line*

e) **Void a ticket** – This can be done at any time after items have been added and before the ticket is ended. The voided ticket number will be on the exceptions report.

f) **Putting an order on hold –** An order can be put on hold any time after items have been added and before the ticket is ended.
   i) Hold orders are set to a status Ø
   ii) The order remains on hold until you continue it.

3) Changing an order - **Action Code: Change**
   a) Order Browse will open the query window to display all open tickets eligible for change (Status 7 or less). Select the appropriate ticket.
   b) Change screen allows change of the following fields: order qty, ship qty, sell price, A. cost, P. cost, G.P. %, List, Vender P/O, DS,
   c) Item Detail screen allows substitutions, the above changes, adding additional items to the order, deleting items from the order, taxable and item order notes.
   d) Global detail can be changed for the order: Customer purchase order number, General Ledger location, Due date, Invoice date, Salesperson, Tax status, Tax district, Shipping address, Customer, Start of order notes (AAAA specials), End of order notes (ZZZZ specials), LABELZ specials.

4) Deleting an order – **Action Code**: **Delete**
   a) Order Browse will open the query window to display all open tickets eligible for deletion (Status 7 or less). Select the appropriate ticket(s) or type in the ticket number.
   b) Enter the Delete password (LG0)

c) Delete window allows deletion of individual line items (select the line item for deletion), all backordered items, or all items (entire ticket).

5) Initial or final verify a ticket – **Action Code: Initial Verify/Final Verify**

a) *Verify tab* - In this tab, you can change the shipped quantity, change costs and pricing for items on the pick ticket, view and change order settings, view and change notes for the order, and add freight to the order.

i) Increasing shipped quantity will open a Deduct Change from On Hand window. Click yes to deduct items from on-hand.

6) Credit an invoice – **Action Code: Credit**

(Credits are covered in depth in Order Entry 2)