

Order Entry

User Manual

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Guide Introduction

The purpose of this guide is to assist AutoPower end-users in mastering the fundamental elements of Order Entry. It serves as a self-help tool, providing step-by-step explanations and examples. You are encouraged to use this training resource in combination with your AutoPower applications database or by utilizing the examples provided.

Upon reviewing the content provided in this Order Entry guide, you will be well prepared to perform the critical tasks listed below, and more.

CRITICAL TASKS

- View Inventory/Parts Inquiry
- Create an Order
- Edit an Order
- Place Orders on Hold, and Recall Orders
- Print Packing Slips, Pick Tickets, and more
- Print Invoices and Reprinting Invoices from History
- View Customer Part Purchase History
- Complete Customer Returns and Warranty Returns
- Complete Core Exchanges and Core Returns
- Process Back Orders

In the AutoPower system, you can use the Escape, Backspace, Space Bar, and Delete keys only in specific areas. We'll highlight these areas for you. Avoid using these keys elsewhere, as they affect control characters in data records.

LOGGING ON

Use your assigned username and password to access the AutoPower System. If you forget your credentials, contact your manager for a reset.

Username input displays characters as typed, while password input is confidential and won't show characters or move the cursor.

```
Welcome to the AutoPower DevServer.  
Enter user name:  
Enter password:
```

After logging in, the Main Menu screen will be displayed.

MAIN MENU

After logging in, you will be presented with the Main Menu. Your Main Menu may slightly vary from what you see here as you may have different modules or operator permissions. Stay attentive to menu options for efficient navigation to your desired functions within the system.

```
Tuesday, 06/25/19      AUTOPOWER CORPORATION      (P33)  
  
                MAIN MENU  
  
1...Inventory MENU  
2...Order Entry MENU  
3...Work Order MENU  
4...Sales Analysis MENU  
5...Accounts Receivable MENU  
6...Utilities MENU  
  
Enter Selection: █
```

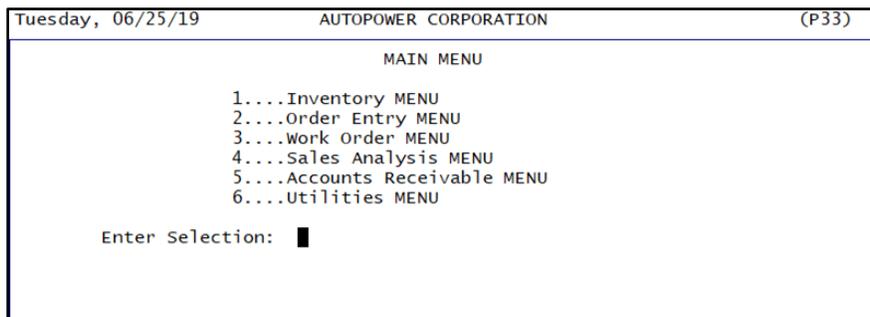
Part Inquiry

Welcome to the Screen Overview of the Part Inquiry screen, your comprehensive source for detailed information on specific parts. This interface provides quick access to essential part details and facilitates in-depth research for more data.

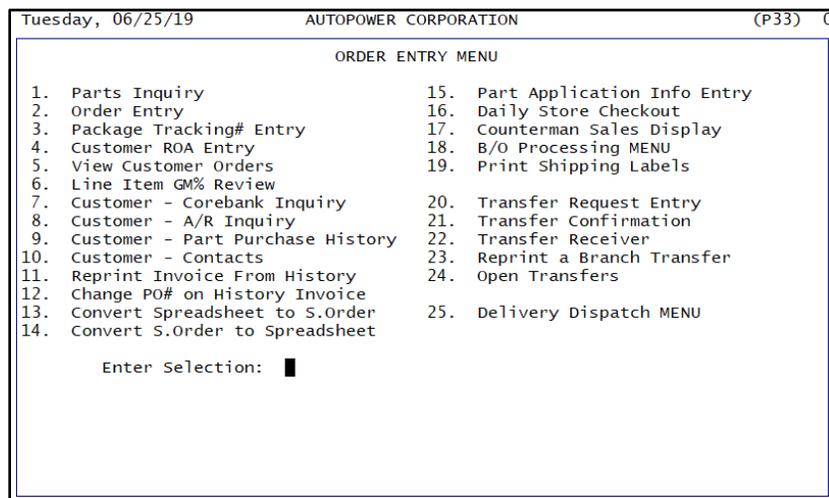
This section will help you, understand the main features and functions of the Part Inquiry screen.

Open Part Inquiry

1. **Accessing the Parts Inquiry Screen:** Start from the Main Menu. Enter the option number for the "Order Entry Menu" and press ENTER.



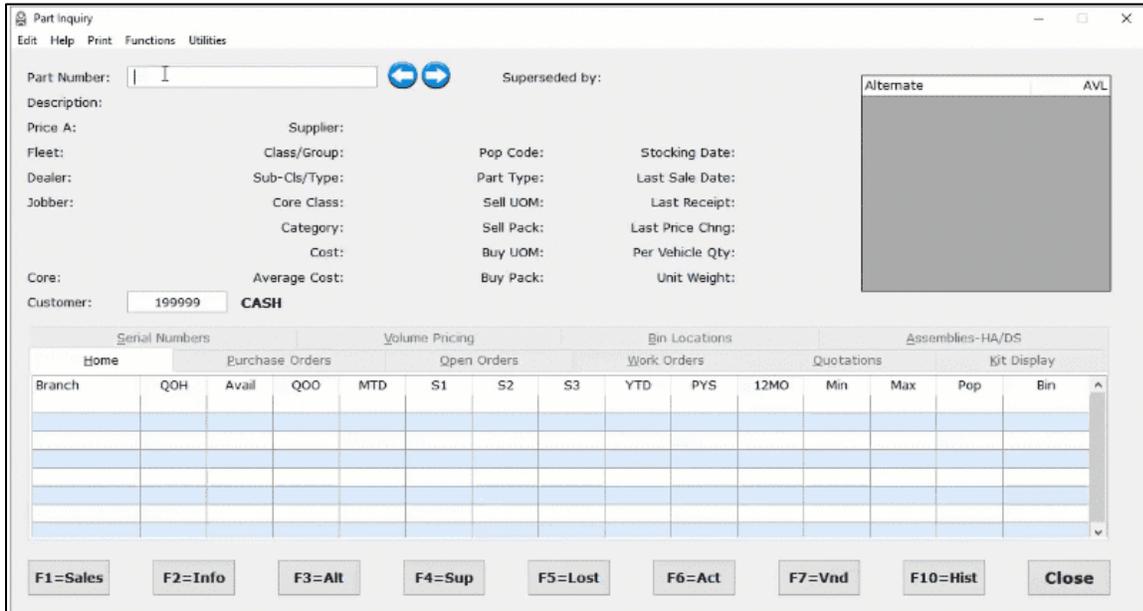
2. **Navigating to Parts Inquiry:** From the Order Entry Menu, enter the menu option number for "Parts Inquiry" and press ENTER. This action will bring up the Parts/Inventory Inquiry Screen.



The Part Inquiry Screen will be displayed.

Part Inquiry - Screen Overview

When a found part is displayed on the Part Inquiry screen, you will have access to a wealth of information about that part. Some details will be immediately visible, while additional data will require further exploration of the screen.

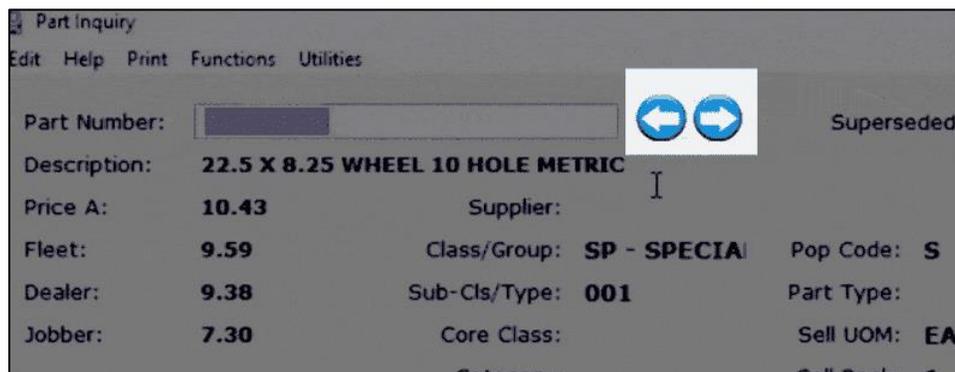


Part Inquiry - Upper Screen

In the upper section of the screen, you'll find important pricing details and other information for the displayed part.

Directional Arrows

You can use the directional arrows next to the "Part Number:" field to move to the previous or next part number in the inventory list. These arrows work in conjunction with the Part Query function described later in this manual.



Superseded by

If the part you're viewing has been superseded, the part will be listed under the "Superseded by:" field. Click the part number shown there to see details of the new part. To go back to the original part, check the "Alternate Parts" section.

Part Inquiry
 Edit Help Print Functions Utilities

Part Number: ← → **Superseded by: X/WX-46510**

Description: **19.5X6 DUAL WHEEL CHEVY P300 WHEEL**

Price A: **565.22** Supplier:

Fleet: **484.47** Class/Group: Pop Code: **S** Stocking Date:

Dealer: **443.29** Sub-Cls/Type: **033** Part Type: Last Sale Date:

Jobber: **403.73** Core Class: Sell UOM: **EA** Last Receipt:

Category: Sell Pack: Last Price Chng: **09/20/22**

Cost: **161.49** Buy UOM: **EA** Per Vehicle Qty:

Core: Average Cost: **161.49** Buy Pack: **1** Unit Weight: **46.00**

Customer: **CASH** **Adjusted Customer Price=\$565.89**

Customer Pricing

To verify customer pricing for the displayed part, select the "Customer:" field, input the customer account number, or use the customer search to find it. The customer's pricing will then display to the right of the "Customer:" field.

Part Inquiry
 Edit Help Print Functions Utilities

Part Number: ← → **Superseded by: ACC29829**

Description: **ACCURIDE 20"X8" 10 HOLE 11.25" B.C.**

Price A: **1,481.76** Supplier:

Fleet: **1,270.08** Class/Group: Pop Code: **S** Stocking Date: **11/14/18**

Dealer: **1,162.12** Sub-Cls/Type: **001** Part Type: Last Sale Date: **03/13/19**

Jobber: **1,058.40** Core Class: Sell UOM: **EA** Last Receipt: **03/13/19**

Category: Sell Pack: Last Price Chng: **09/20/22**

Cost: **423.36** Buy UOM: **EA** Per Vehicle Qty:

Core: Average Cost: **368.09** Buy Pack: **1** Unit Weight: **115.00**

Customer: 12345 REEDY CREEK CORP. Customer Price=23.38% over F \$1567.02

Alternate	AVL
ACC29829	0
MWC87060	0
ABC11112	6
ABC1111	18
ABC111	2

Serial Numbers	Volume Pricing			Bin Locations			Assemblies-HA/DS							
Home	Purchase Orders		Open Orders		Work Orders		Quotations		Kit Display					
Branch	QOH	Avail	QOO	MTD	S1	S2	S3	YTD	PYS	12MO	Min	Max	Pop	Bin
AUTOPOWER	2	2	0						0	0			F	A-12
COLUMBIA	NOF		0							0				
FAYETTEVILLE	NOF		0							0				
WILSON	NOF		0							0				
CHARLESTON	NOF		0							0				
NORCROSS	NOF		0							0				

F1=Sales **F2=Info** **F3=Alt** **F4=Sup** **F5=Lost** **F6=Act** **F7=Vnd** **F10=Hist** **Close**

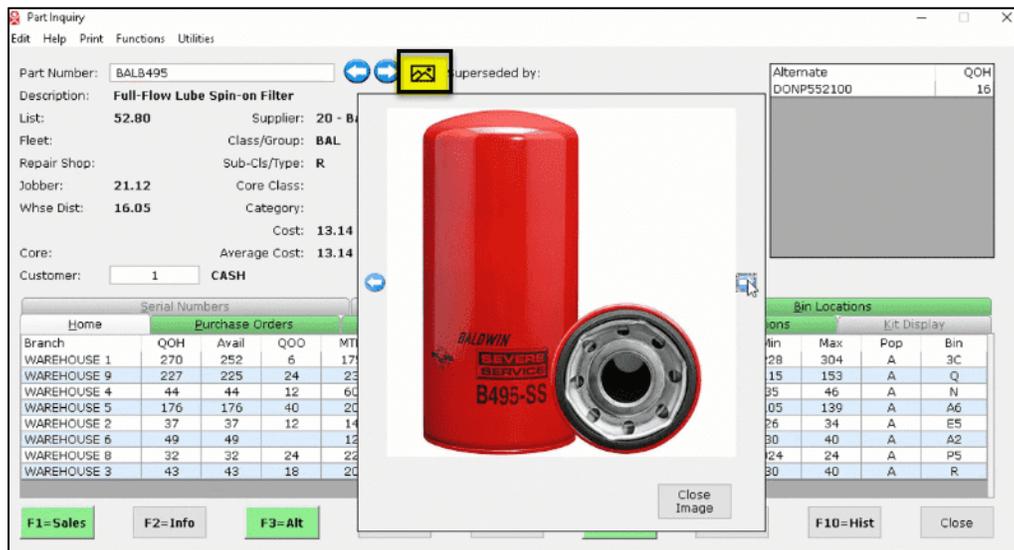
Alternate Parts List

If the part shown on the Part Inquiry screen has alternative parts available, you'll see them listed in the Alternate box at the upper right corner of the screen. To access information about an alternative part, just click on its part number, and you'll see its details displayed.



Inventory Picture Icon

When there are pictures available for a part, you'll see a picture icon located between the navigation buttons and the "Superseded By" field. By clicking on this icon, you can view all the pictures associated with that part. For guidance on how to assign pictures to part numbers, please reach out to AutoPower support.



Part Inquiry - Lower Screen

Tabs

The screenshot shows the 'Part Inquiry' window with the following details:

- Part Number:** [Input field]
- Description:** T20A 30" TIRE IRON
- Price A:** 32.99
- Fleet:** 17.68
- Dealer:** 23.56
- Jobber:** 16.49
- Core:** [Input field]
- Customer:** 199999 CASH
- Superseded by:** [Input field]
- Supplier:** [Input field]
- Class/Group:** [Input field]
- Sub-Cls/Type:** [Input field]
- Core Class:** [Input field]
- Category:** [Input field]
- Cost:** 12.37
- Average Cost:** 12.37
- Pop Code:** [Input field]
- Stocking Date:** 07/29/11
- Part Type:** [Input field]
- Last Sale Date:** 09/23/17
- Sell UOM:** EA
- Last Receipt:** 09/15/17
- Sell Pack:** [Input field]
- Last Price Chng:** 02/13/16
- Buy UOM:** EA
- Per Vehicle Qty:** [Input field]
- Buy Pack:** 1
- Unit Weight:** [Input field]
- Adjusted Customer Price:** \$32.69

Table: Assemblies-HA/DS

Branch	Purchase Orders			Open Orders			Work Orders			Quotations			Bin
	QOH	Avail	QOO	MTD	S1	S2	S3	YTD	PYS	12MO	Min	Max	
AUTOPOWER	2	2	0							0	2	2	F
COLUMBIA	3	3	0							0	0	0	E
FAYETTEVILLE	1	1	0							0	2	2	C
WILSON	NOF		0							0			
CHARLESTON	2	2	0							0	2	2	D
NORCROSS	2	2	0							0	0	0	E

Buttons: F1=Sales, F2=Info, F3=AR, F4=Sup, F5=Lost, F8=Act, F7=Vnd, F10=Hist, Close

Home – Displays the warehouse location information for the part being displayed.

Purchase Orders – Displays all open issued purchase orders that contain the part being displayed.

Open Orders – Displays all open sales orders and branch transfers that contain the part that is being displayed.

Work Orders – Displays any open vehicle service work orders that contain the part that is being displayed.

Quotations – Displays all sales quotes that contain the part being displayed.

Kit Display – Displays kit information for the part being displayed. If the part being displayed is a Made-To-Order or Stocked kit, the components of the kit will be displayed. If the part being displayed is a component of a kit, the kit part number will be displayed.

Serial Number – Displays the serial numbers that are associated with the part being displayed. If your system utilizes the Unit Rebuild module, all completed work orders for the part being displayed will be listed.

Volume Pricing – Displays the volume price table for the part being displayed.

Bin Locations – Displays the MULTI BINS for this part. The location's primary bin is listed on the screen on the HOME tab.

Assembles - HA/DA – Displays all Hose Assemblies and/or Drive Shaft Assemblies and the associated open work orders in progress.

Note: The tabs associated with specialty modules will only display if the modules are utilized within your system.

Function Keys

The screenshot shows the 'Part Inquiry' window for part number 5777300. The description is 'T26A 30" TIRE IRON'. The interface includes a menu bar (Edit, Help, Print, Functions, Utilities), a 'Superseded by:' field, and a 'Price A:' field showing 32.99. Below this is a grid with tabs for 'Serial Numbers', 'Volume Pricing', 'Bin Locations', and 'Assembles HA/DS'. The 'Serial Numbers' tab is active, showing a table with columns for Branch, QOH, Avail, QOO, MTD, S1, S2, S3, YTD, PYS, 12MO, Min, Max, Pop, and Bin. The table lists branches: AUTOPOWER, COLUMBIA, FAYETTEVILLE, WILSON, CHARLESTON, and NORCROSS. At the bottom, there are function key buttons: F1=Sales, F2=Info, F3=Alt, F4=Sup, F5=Lost, F6=Act, F7=Vnd, F10=Hist, and a Close button.

Branch	QOH	Avail	QOO	MTD	S1	S2	S3	YTD	PYS	12MO	Min	Max	Pop	Bin
AUTOPOWER	2	2	0							0	2	2	F	
COLUMBIA	3	3	0							0	0	0	E	
FAYETTEVILLE	1	1	0							0	2	2	C	
WILSON	NOF		0							0				
CHARLESTON	2	2	0							0	2	2	D	
NORCROSS	2	2	0							0	0	0	E	

- F1 = Sales – Displays sales history screen for the part.
- F2 = Info – Displays Part Application Information for the part.
- F3 = Alt – Displays more information on the Alternate parts.
- F4 = Sup – Displays the information of the Supersede part.
- F5 = Lost – Allows you to enter a lost sale and the reason the sale was lost.
- F6 = Act – Displays all transactions that have changed the quantity on hand of the part.
- F7 = Vnd – Displays all alternate suppliers for this part.
- F10 = Hist – (Feature Unavailable at this time)

Order Entry Workbook

Green Highlights

When you search for a part number, tabs or buttons with data available will highlight in green. Click on any highlighted tab or button to display the data.

Part Inquiry
Edit Help Print Functions Utilities

Part Number: **ACC28408E** Superseded by: **ACC28408PW**

Description: **22.5 X 8.25 WHEEL 10 HOLE METRIC**

Price A: **10.43** Supplier:

Fleet: **9.59** Class/Group: **SP - SPECIA** Pop Code: **S** Stocking Date:

Dealer: **9.38** Sub-Cls/Type: **001** Part Type: Last Sale Date:

Jobber: **7.30** Core Class: Sell UOM: **EA** Last Receipt: **07/26/18**

Category: Sell Pack: **1** Last Price Chng: **09/20/22**

Cost: **0.20** Buy UOM: **EA** Per Vehicle Qty:

Core: Average Cost: **0.20** Buy Pack: **24** Unit Weight: **82.00**

Customer: **199999 CASH** Adjusted Customer Price=**\$10.89**

Serial Numbers		Volume Pricing			Bin Locations					Assemblies-HA/DS				
Home	Purchase Orders	Open Orders	Work Orders	Quotations	Kit Display									
Branch	QOH	Avail	Q00	MTD	S1	S2	S3	YTD	PYS	12MO	Min	Max	Pop	Bin
AUTOPOWER	NOF		0							0				
COLUMBIA	0	0	0							0	97	138	A	SHF
FAYETTEVILLE	0	0	0							0	24	34	A	
WILSON	0	0	0							0	12	16	A	
CHARLESTON	0	0	0							0	35	50	A	
NORCROSS	0	0	0							0	30	42	A	

Alternate AVL
ACC28408PKW 0
MWC90541E 52
ACC28408 21
ACC28408PW 452

F1=Sales **F2=Info** **F3=Alt** **F4=Sup** F5=Lost **F6=Act** **F7=Vnd** F10=Hist Close

Part Inquiry - Part Search

This section explains how to search for specific parts, including methods for searching with partial part numbers.

Part Number Structure

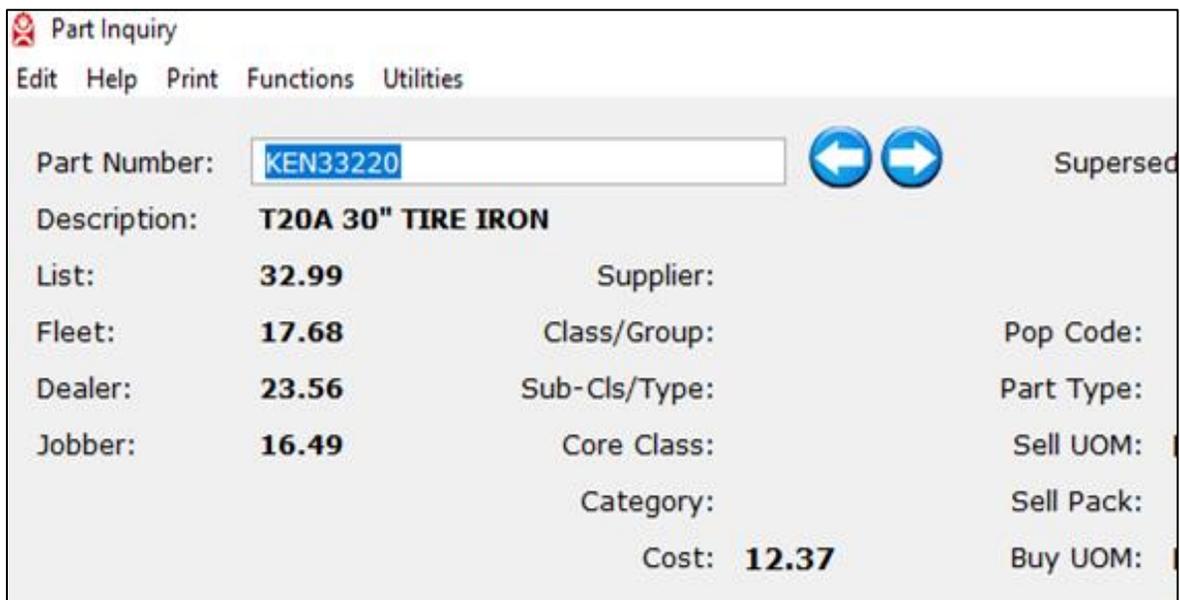
In AutoPower, a full part number comprises a 3-character vendor prefix and the part number. For instance, the part number for Chicago Rawhide, "CHI19223," combines the vendor code "CHI" with "19223."

EXAMPLE: **Chicago Rawhide Part #19223 = CHI19223**

The 3-character vendor code that's been assigned to represent Chicago Rawhide, CHI, followed by the body of the part number 19223.

Standard Part Search with Full Part Number

For a complete search, enter both the vendor code and the part number. For example, to find part "KEN33220," you would enter "KEN" for the vendor and "33220" for the part. The search results will display immediately.



The screenshot shows a software window titled "Part Inquiry" with a menu bar containing "Edit", "Help", "Print", "Functions", and "Utilities". The main area displays the following information:

Part Number:	<input type="text" value="KEN33220"/>		Supersed
Description:	T20A 30" TIRE IRON		
List:	32.99	Supplier:	
Fleet:	17.68	Class/Group:	Pop Code:
Dealer:	23.56	Sub-Cls/Type:	Part Type:
Jobber:	16.49	Core Class:	Sell UOM:
		Category:	Sell Pack:
		Cost: 12.37	Buy UOM:

Note: Your Part Inquiry features may differ from the example shown due to operator permissions or variations in system modules.

Part Inquiry - Part Search Results

After performing a part search, the results screen will display three tabs:

- **Exact Matches:** Displays results that match the entered part number or description.
- **Stocked Items:** Displays results of only parts that are in stock.
- **All Items:** Displays results of both stocked and non-stocked parts.

The screenshot shows a 'Part Search' window with a search string of 'BRAKE' and 336 items found. The 'Exact Matches' tab is selected, displaying a table of results. The table has columns for VND, Part Number, Description, QOH, AVL, QOO, All-AVL, and OEM Part Number. The results list various brake components such as brake shoes, kits, and boxes.

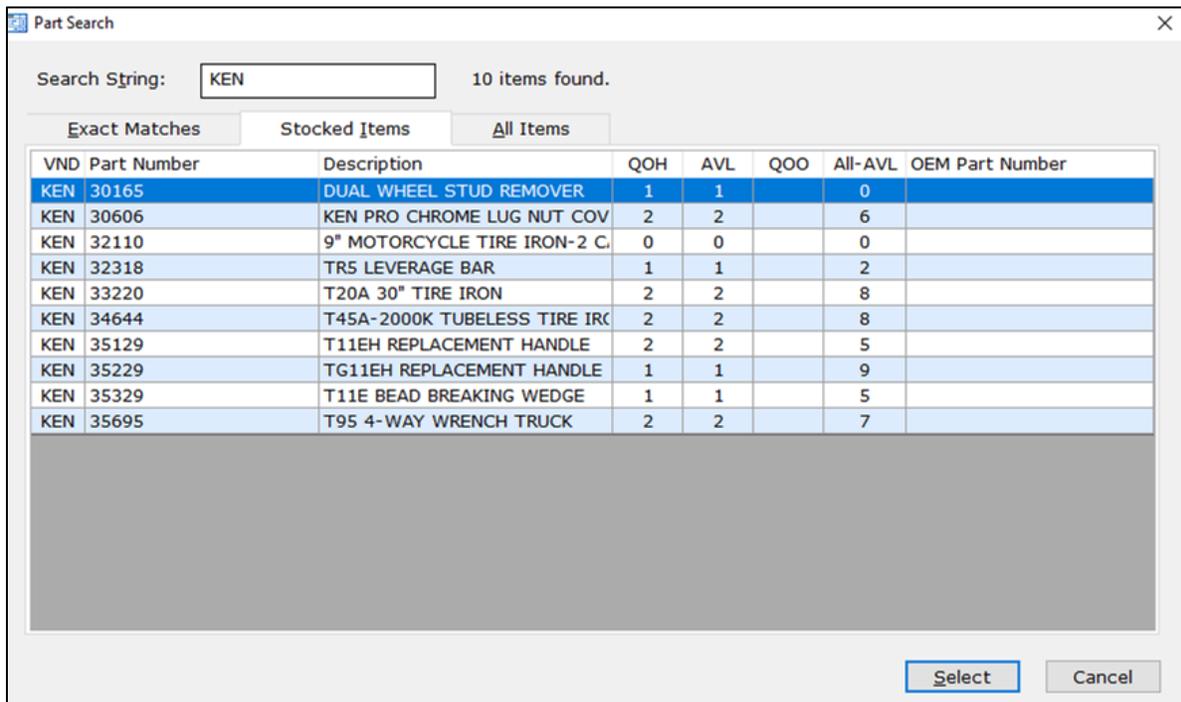
VND	Part Number	Description	QOH	AVL	QOO	All-AVL	OEM Part Number
BSR	4719E2MA212	BRAKE SHOE - EXCHANGE	-3	0		0	
BSR	4719E2MA312	BRAKE SHOE - EXCHANGE	7	7		0	
BSR	4720QMA312	BRAKE SHOE - EXCHANGE	-4	0		0	
BSR	4725E2MA212	BRAKE SHOE - EXCHANGE	2	2		0	
BSR	4725E2MA312	BRAKE SHOE - EXCHANGE	10	10		0	
BSR	4725EMA312	BRAKE SHOE - EXCHANGE	-1	0		0	
BSR	4726E2MA312	BRAKE SHOE - EXCHANGE	4	4		0	
BSR	4726EMA212	BRAKE SHOE - EXCHANGE	5	5		0	
BSR	K4515FT23Q	23K BRAKE KIT - ROCKWELL 451	20	19		0	
BSR	KIT4725E2MA312	BRAKE SHOE KIT	4	4		0	
BSR	RRSHOE-19032	R&R 19032 BRAKE SHOE	8	8		0	
BSR	RRSHOES	R & R BRAKE SHOES	-876	0		0	
BSR	SHOEBOXB	BRAKE SHOE BOX	20	20		0	
DEX	023-026-00	BRAKE DX 10X2 1/4 ELEC LH	20	20		58	
DEX	023-027-00	BRAKE DX 10X2 1/4 ELEC RH	14	14		61	
DEX	023-048-00	BRAKE DX 7X1 1/4 ELEC RH		0		0	
DEX	023-105-00	BRAKE 12X2 DXQ LH	39	39		0	
DFX	023-105-09	BRAKE 12X2 DXQ LH 9 HOIF MO	60	60	1	93	

Part Search Methods

Searching for part information in Parts Inquiry is straightforward with a full part number. If you only have a partial number, you can use the following methods:

Search Method: Vendor Code

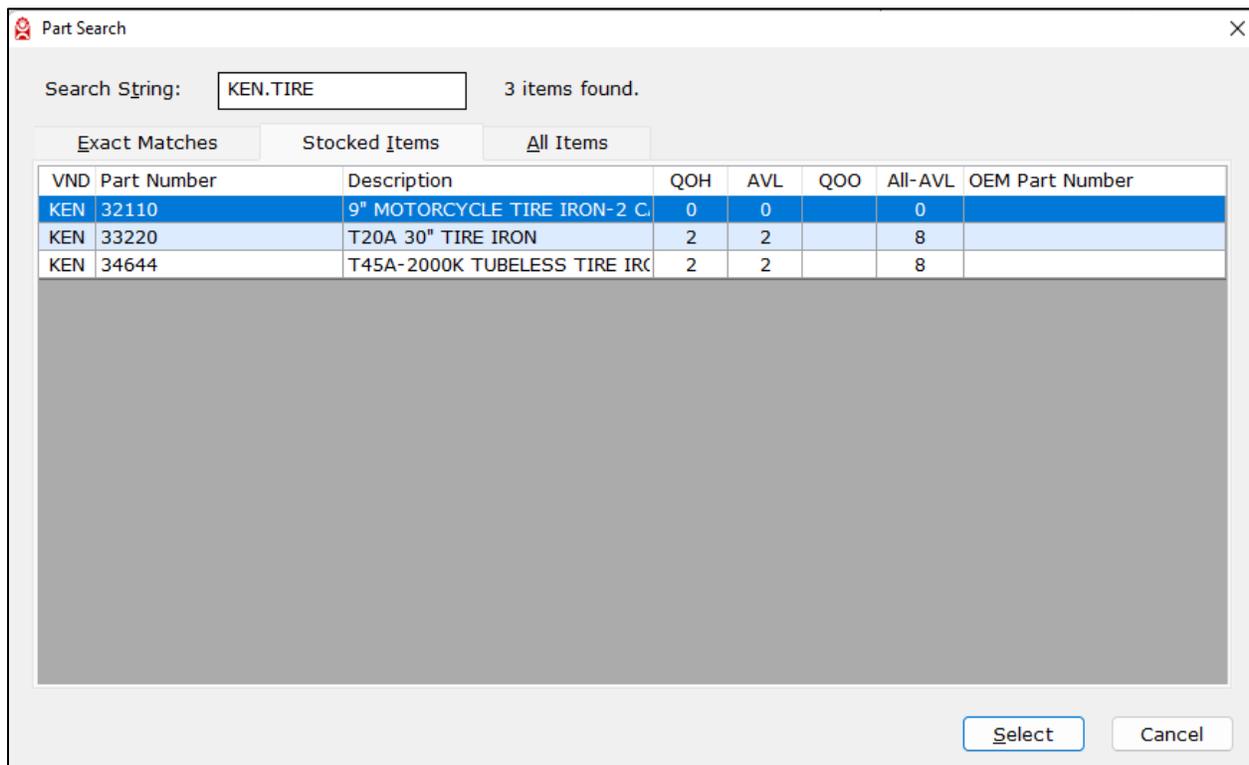
Searching with just the vendor code will return a list of all part numbers associated with that vendor.



Search Method: Partial Part number AND a Word

Entering a partial part number or a word in the search field will find matches in both the part number and description across all vendors. For more specific results, include a vendor code followed by a period (.) and a single word of the part description.

For instance, if you enter "KEN.TIRE" as the search criteria, it will return all parts associated with the vendor code "KEN" that have "TIRE" in either the description or the part number.



The screenshot shows a 'Part Search' dialog box with a search string of 'KEN.TIRE' and 3 items found. The results are displayed in a table with columns for Vendor (VND), Part Number, Description, QOH, AVL, QOO, All-AVL, and OEM Part Number. The first row is highlighted in blue.

VND	Part Number	Description	QOH	AVL	QOO	All-AVL	OEM Part Number
KEN	32110	9" MOTORCYCLE TIRE IRON-2 C.	0	0		0	
KEN	33220	T20A 30" TIRE IRON	2	2		8	
KEN	34644	T45A-2000K TUBELESS TIRE IRC	2	2		8	

Buttons: Select, Cancel

Search Method: Partial Part Number OR a Word

Part searches can be conducted using partial part numbers or specific words. Entering "4709" as the search string will display a list of all parts containing "4709" in the part number or description, including parts from all vendor codes where a match is found.

Part Search

Search String: 28 items found.

Exact Matches Stocked Items All Items

VND	Part Number	Description	QOH	AVL	QOO	All-AVL	OEM Part Number
BSR	4709E2MET	BRAKE SHOE - EXCHANGE	4	4		0	
BSR	4709E2PM	BRAKE SHOE - EXCHANGE	2	2		0	
BSR	4709E2R301	BRAKE SHOE - EXCHANGE	1	1		0	
BSR	4709EF520	BRAKE SHOE - EXCHANGE	-2	0		0	
BSR	4709EF523	BRAKE SHOE - EXCHANGE	6	6		0	
BSR	4709EM20	BRAKE SHOE - EXCHANGE	-8	0		0	
BSR	4709EM23	BRAKE SHOE - EXCHANGE	2	2		0	
BSR	4709EMA210	BRAKE SHOE - EXCHANGE	16	16		0	
BSR	4709EMA212	BRAKE SHOE - E.S. - EXCHANGE	-16	0		0	
BSR	4709EMA312	BRAKE SHOE - EXCHANGE	2	2		0	
BSR	KIT4709E2F560	STOP BOX KIT	-2	0		0	
MER	F5204709B	BRAKE BLOCK	0	0	22	0	
MER	F5234709B	BRAKE BLOCK	0	0	22	0	
MER	F5504709	BRAKE BLOCK	0	0	4	0	
MER	F5554709	BRAKE BLOCK	0	0	10	0	
MER	F5604709	BRAKE BLOCK	0	0	4	0	
MER	MA2104709D	BRAKE BLOCK	0	0	2	0	
MFR	MA2124709B	BRAKE BLOCK	0	0	18	0	

Select Cancel

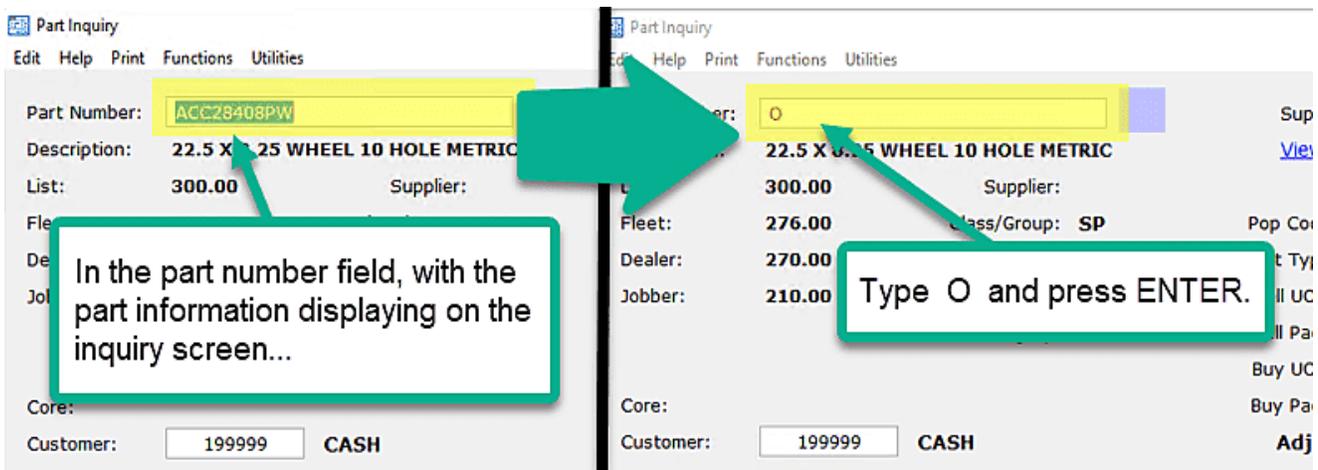
Part Inquiry to Order Entry - Transition Process

1. Immediate Purchase Confirmation:

- If a part displayed on the Part Inquiry screen is to be purchased immediately, select the part number.
- Type 'O' in the part number field and press ENTER.

2. Order Entry Look Up Screen:

- After entering 'O', the Part Inquiry screen will close, and you will be redirected to the Order Entry Lookup screen.
- Use the process outlined in this guide to start a new order by looking up the customer account.



3. Adding Parts to the Order:

- On the Order Entry Part Entry screen, when ready to add parts to the order:
 - Press the SPACE BAR in the line-item field.
 - Then, press ENTER.

4. Automatic Inclusion in Sales Order:

- The part number from the Part Inquiry will be automatically added to the sales order.
- Any applicable alternate parts will also be included, ensuring a smooth and efficient ordering process.

07/12/23

Ship To: CASTLE DREAMS
FL 32746
12345 - 1

Terms: A-NET 30 D

ITM	Part Number
1	█

07/12/23 INFO

Ship To: CASTLE DREAMS
12345 - 1

Terms: A-

ITM	Part Number
1	ACC 28408PW
	ALT MWC90541E
	ALT ACC28408
	ALT ACC28408E

Press SPACE BAR then ENTER on the first item line.

The part number from the parts inquiry screen will be added to the order.

Order Entry Overview

Order Entry Process - Quick Reference Guide

This section is a concise guide designed for quick reference purposes, providing a snapshot of key steps in the order entry process. It is important to note that this quick guide does not encompass all the intricate details involved in order entry.

These quick steps serve as a handy reference tool for experienced users or as an initial overview for newcomers. As you dive into the order entry tasks, remember that the complete guide is your comprehensive resource for detailed insights, promoting accuracy and efficiency in the order entry process. The comprehensive guide offers in-depth explanations, ensuring that users gain a thorough grasp of each step and critical aspect of order entry.

Quick Reference Steps

1. Access Order Entry:

- a. From the Main Menu, input Order Entry option number and press ENTER.
- b. On the Order Entry Menu, type the option number for Order Entry and press ENTER,
 - i. Arrive on the Lookup Screen

2. Account Number Lookup:

- a. If the account number is known, enter at "Account No:" prompt and press Enter.
- b. If unknown, use F2 Search:
 - i. Enter part of account name, city, or last four phone digits.
 - The screen displays matching accounts search results.
 - ii. Hover over desired account, double-click to return to Order Entry Lookup.

3. Operator Number Entry:

- a. Enter your Operator number and press ENTER.

4. Check for Open Orders:

- i. If the customer has open orders, a notification prompt appears:
"Customer has 3 orders on file. See them? (Y,N): "
- ii. To view the customer's open orders, type Y and press ENTER.
 - Select the desired order by entering the line-item number and pressing ENTER.
- iii. To start a new order, type N and press ENTER

5. **Proceed to Parts Entry:** After entering a valid customer account number and your operator number, the Parts Entry screen will display.

6. **Add Parts/Items to an Order:** Type part number (e.g., ABC11111) beginning with the vendor code and press ENTER.

- a. If part number match is found, it's added to the order.
- b. If part number match is not found, review part search results, select a part from the search results by entering the line-item number.

i. Part Search Methods in Order Entry:

- Numeric Search:
 - Example: /12
 - Finds parts like ABC72128, XYZ92-012B, etc.
- Vendor Code Search:
 - Example: ABC/
 - Finds all parts for the ABC line, such as ABC72128, ABC1234, etc.
- Combined Numeric and Vendor Code Search:
 - Example: ABC/12
 - Finds parts like ABC72128, ABC1234, etc.

- Dot Prefix Search:
 - Example: .12
 - Conducts both /12 and .12 searches, finding parts like DEF555-12-AB or 12 OZ PAINT.
- Description Keyword Search:
 - Example: .BEARING
 - Conducts both /BEARING and .BEARING searches, finding parts like KLM700-BR549 BEARING, MUFFLER.
- Vendor Code Search (2):
 - Example: ABC.
 - Equivalent to ABC/.
- Combined Vendor Code Alias and Numeric Search:
 - Example: ABC.12
 - Finds parts like ABC9285 12 INCH BRACKET.
- General Numeric Search:
 - Example: 12
 - Performs both /12 and .12 searches.
- General Keyword Search:
 - Example: MUFFLER
 - Performs both /MUFFLER and MUFFLER searches.

7. Type in the order quantity in the ORD column and press ENTER.

- a. The B/O column reflects backorder quantity if applicable.

8. Continuing to Add Parts/Items:

- a. Add all items to the sales order.
 - i. Adding Another Part from the Same Vendor: Use "." search command for the same vendor (e.g., ABC).
 - To expand the search, press the space bar before typing ".".
 - Select the part from the search results by entering the line-item number.
 - ii. Adding a Part from a Different Vendor Product Line: Type part number and quantity (e.g., DEF1111 and 12) in the ORD column.

9. Make Edits to your order if needed.

- a. Edit part quantity: Use "/" followed by line number to go back and make changes to quantity (e.g., "/1" for line #1)
- b. Price Change: Make price changes typing in the order quantity followed by 'P' in the ORD column. Choose new price, margin percentage, or multiplier to adjust.
- c. Remove a Part: Recall line by entering "/" and line number, then enter 'X' in the ORD column to cancel.

10. Proceed to Totals: When all the desired parts have been added to the order, press enter;

- a. The Totals screen will display.

11. "Counter Pickup or Delivery?" Prompt:

- a. Upon reaching the Totals Screen, the system prompts for the nature of the order.
 - i. Type (C) for Counter pickup if the customer will pick up and leave with the parts.
 - ii. Type (D) for Delivery if the parts are to be delivered.

b. Calculating Tax:

- i. The system calculates customer tax based on the chosen option (C or D).
- ii. Sales tax is determined from the tax table applicable to the customer's area.
- iii. "EXEMPT" displays if the customer is Sales Tax exempt.
- iv. The calculated sales tax is totaled with the order.

c. Prompt for Additional Options:

- i. After tax calculation, the system prompts for the next action.
- ii. Returning to Parts Entry Screen:
 - Typing the letter "A" takes you back to the Parts Entry Screen.
 - This option allows you to add more parts to the existing order, if needed.

12. Apply Discounts, Freight, Fees and Taxes: Select any of the line items on this screen and enter the corresponding line number to edit the field.

13. Review Order Summary Display:

- a. Shows total weight for shipped and backordered items.
 - i. Weight information is derived from the Inventory File Maintenance.
- b. Shows total dollar amounts for shipped and backordered items.
- c. Shows Shop Supplies, Env Fee, HazMat Deposits, HazMat Returns:
 - i. These values are automatically populated through the Vehicle Shop Module.
 - ii. The system pulls information from the relevant modules to reflect shop supplies, environmental fees, hazardous material deposits, and returns.

14. Proceed To Options Screen: Press ENTER to proceed to the next screen (the Options Screen).

15. Change and Add information (If no changes are needed proceed to item 17): Use the letter options to select what you wish to apply information or changes. These are the most common fields that are used:

- a. Changing Ship Via Code:
 - i. At the Option: prompt, key in the corresponding line number and press ENTER.
 - ii. Press F1 to display Ship Via code choices.
 - iii. Select the appropriate Ship Via code based on customer preferences
- b. Changing Ship-To or Bill-To Account:
 - i. If needed, Press F7 to change Ship-To or Bill-To account numbers.

c. Changing Terms Code:

- i. To alter payment terms, press F8 and press ENTER.
- ii. Select the payment terms code (method of payment) that will be used:
 - G - Cash Pay Terms cannot be changed to Charge On Account Pay Terms.
- iii. Credit Card Systems with Card Swipes:
 - If payment is via credit card, changing the terms code prompts for credit card details.
 - Three ways to enter credit card transactions: swipe, key entry, or use a retained credit card.

16. Not Ready to Invoice (If ready to invoice, proceed to item 18):

- a. Press H to Hold the Order
 - i. The order is placed on hold.
 - ii. The order can be recalled and Parts can be added as well as other options available to a new order can be performed.
 - iii. Inventory is affected.
- b. Press Q to produce a Quote
 - i. This will print the order as a quote.
 - Quotes do not affect inventory in any way, which is not the same for Invoices, Pick Tickets, Packing List, and orders placed on hold.

17. Ready to Invoice: Press Y to invoice the order.

- a. Prints this order as a completed Invoice.
 - i. Additional parts cannot be added to this order after you have invoiced it.

18. Print Outs

a. Pick Tickets

- i. Press 'P' to initiate the printing of Pick Tickets for the order.
 - This action can be performed before invoicing, allowing flexibility in the order processing.
 - The order remains stored in the system even after printing the Pick Ticket
 - Parts can be added to the existing order after printing the Pick Ticket.
 - If reprinting Pick Tickets is required, the system prompts the user to print with all parts or only the new parts added.

b. Packing Slips

- i. Press 'S' to initiate the printing of Packing Slips for the order.
 - You cannot print a packing list prior to invoicing.
 - A Packing List cannot be printed for a credit memo.

This concludes the basic order creation process in Orde Entry.

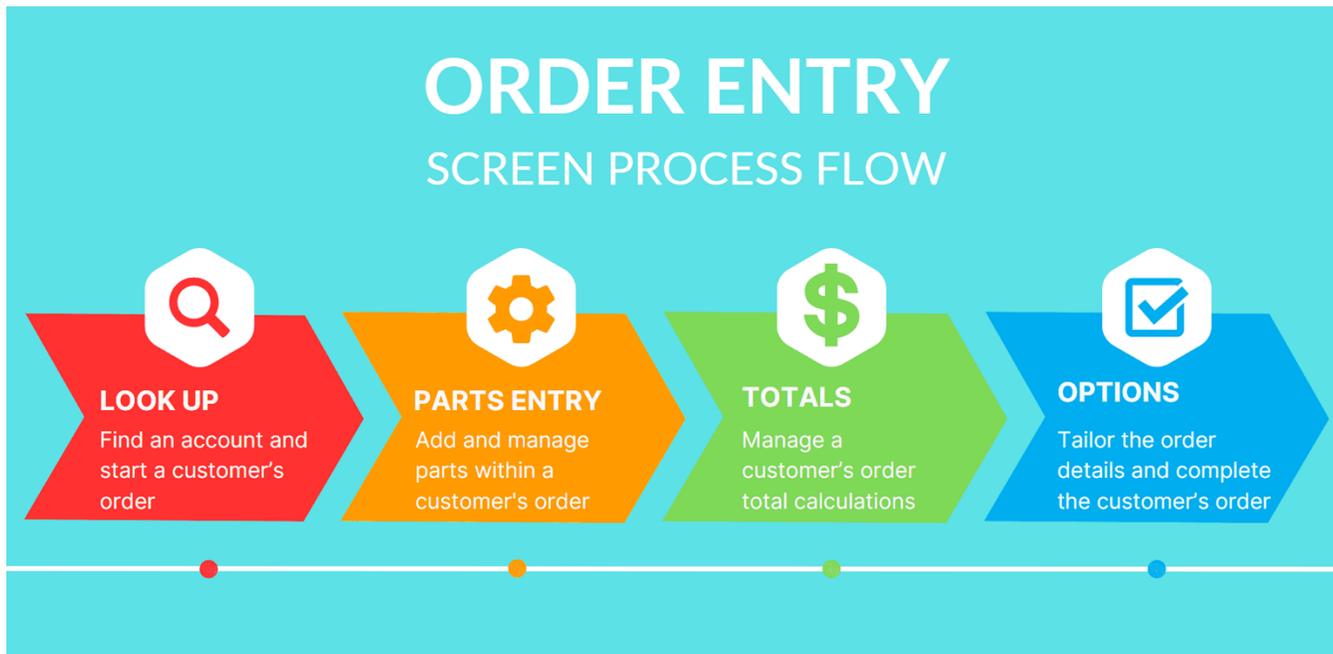
Access Order Entry

From the Main Menu type in the Order Entry Menu option number and press ENTER. On the Order Entry Menu, type in the Order Entry option number and press ENTER to access the Order Entry Screen. The first screen that displays in order entry is shown below. This is known as the Lookup Screen.

06/26/19		Order No: w1								
Ship To:										
Terms:				Ctr:			PO:			
ITM	Part Number		AVL	ORD	SHP	B/O	Core	Price	Extension	
Account No: █										
f1=Recall		f2=Search		f3=OpenOrd		f4=CustInq		f5=PartInq		f6=Credit
f7=HistInq		f8=CoreInq		f9=CSR		f10=NewAcct		f11=AddInfo		f12=Notes

The 4 Order Entry Screens

As users engage with the Order Entry program, they embark on a systematic journey through various screens designed to streamline and enhance the order processing experience.



- 1. Look Up Screen:** This initial step involves locating and confirming customer account details. The accuracy of this information is fundamental to ensuring that the subsequent stages of the order align with the customer's specifications. It is here also where previously initiated orders can be retrieved for additional processing.
- 2. Parts Entry Screen:** Once the customer is identified, users progress to adding specific parts to the order. This screen not only involves searching and selecting the correct items but may also include applying options to specify quantities, price changes, or any other relevant details associated with the sale.
- 3. Totals Screen:** Managing sales totals is crucial for transparency and accuracy. This screen provides an overview of the financial aspects of the order, allowing users to review costs, taxes, any applicable discounts, and more before proceeding to the next stage.
- 4. Options Screen:** This screen offers additional functionalities and choices. Users may decide whether to leave the sales order as a pick ticket, apply a temporary hold, or issue a quote.

LOOK UP Screen Summary – Order Entry Screen #1

The Lookup Screen, denoted as Order Entry Screen #1, serves as the initial gateway to the Order Entry process, providing a streamlined approach to manage customer orders efficiently. Whether you have a walk-in customer with specific part numbers or a repeat customer with known account details, the Lookup Screen plays a pivotal role in initiating the order entry procedure.

06/26/19		Order No: w1								
Ship To:										
Terms:				Ctr:			PO:			
ITM	Part Number		AVL	ORD	SHP	B/O	Core	Price	Extension	
Account No: ■										
f1=Recall		f2=Search		f3=OpenOrd		f4=CustInq		f5=PartInq		f6=Credit
f7=HistInq		f8=CoreInq		f9=CSR		f10=NewAcct		f11=AddInfo		f12=Notes

Tasks Accomplished on the Lookup Screen:

- Create a New Order
- Account Number Search
- Recall Orders on Hold

Account Search - Methods:

Use the following to search for a customer in Order Entry from the Enter Account field.

By Account Number

In Enter Account field, type complete account number and press enter.

By Name

Press F2; in the Enter Name field, type the first letter, the first 3 letters or the complete customer's name (no punctuation).

By ZIP code

Press F2; in the Enter Name field, type customer's ZIP code and press enter.

By Phone Number

Press F2; in Enter Name field, type last 4 digits or complete customer's Phone number (no spaces or separators).

Function Keys Overview

At the bottom of the order entry lookup screen, you'll find several function key options. We'll focus on the first four, which are the most commonly used and exclusive to this screen.

F1 - Order Recall:

- Purpose: Recall a sales order for review or editing.
- Usage: Press F1 and enter the order number or hit Enter to return to the account prompt.
- Note: Works for orders not yet invoiced or invoiced on the same day.
- Options available after recalling:
 - Add another part to the order
 - Add a comment (printed on the invoice) and view/edit internal notes
 - Shortcut to the total screen
 - W: View/edit vehicle year, make, and model
 - E: Exit the order
 - ?: Display key defining available options

F2 - Customer Search:

- Purpose: Search for a customer using company name, city, ZIP code, or phone number.
- Methods:
 - Search by customer name (partial or full)
 - Enter customer's ZIP code
 - Enter the city
 - Type the last four digits of the customer's phone number
- Selection: If multiple entries match, choose from the list.

F3 - Show Open Orders:

- Purpose: Display open orders for a customer or those entered by a counter person.
- Dual-purpose search: Enter customer number or operator number.
- Selection: Choose an order from the list to recall.

F4 - Customer Account Information Inquiry:

- Purpose: Inquire about basic customer information.
- Usage: Press F4, then type the account number.
- Information displayed: Ship-to address, phone and fax numbers, tax info, back-order status, credit info, salesman name, and price matrix.

F5 - Part Inquiry:

- Purpose: Open the Part Inquiry screen to retrieve detailed part information.
- Usage: Press F5 to access the Part Inquiry screen.

F6 - Credit:

- Purpose: Lookup and manage account credit details, past due payments, and other Accounts Receivable (A/R) information.
- Usage: Press F6 to access the Credit screen

F7 - History Inquiry:

- Purpose: Retrieves customer's sales history for a part number.
- Usage: Press F7 and enter the part number to access the History Inquiry screen.

F8 Core Inquiry

- Purpose: Review core bank details associated with an account.
- Usage: Press F8 to access the Core Inquiry screen.

F9 CSR:

- Purpose: Log a customer service request for delivery to the selected operator.
- Usage: Press F9 and follow the prompts to log a CSR.

F10 New Account:

- Purpose: Create a new customer account.
- Usage: Press F10 to initiate the creation of a new customer account.

F11 Add Info:

- Purpose: Add additional information to an existing account.
- Usage: Press F11 to access the screen for adding information to an account.

F12 Notes:

- Purpose: Access, log, and manage notes associated with an account.
- Usage: Press F12 to view and edit account-related notes.

PARTS ENTRY Screen Summary - Order Entry Screen #2

The Part Entry Screen, denoted as Order Entry Screen #2, is a comprehensive platform for adding and managing parts within a customer's order. This screen facilitates the meticulous handling of part details, ensuring accuracy and flexibility in the order entry process.

Tasks Accomplished on the Parts Entry Screen

- Adding Parts to an Order
- Editing and Deleting Parts on Order
- Price Change Options
- Putting and Order On hold
- Core Processing
- Returns

Parts Entry Screen Layout

Parts Entry Top Section - Customer Info

01/03/23	407-314-8724	Order No: W1*401554	OPEN ORDER
Ship To: CAROLINA FLEET 1000 PALACE PARK LANE 1036-1 P.O. BOX 876 WINTER SPRINGS, FL 32708 USA		No Prior Purchase History	
Terms: A-NET 30 DAYS	NOTAX	B/O OK	Ctr:0 PO:

Top Line: Current Date, Customer’s Phone Number, Order Number and Order Status.

Ship-To: Information: Account Number, Name, Address

Terms: Payment Terms - determined by the customer master record setting.

Tax Status: Determined by the customer master record setting.

B/O Status: Back Order Status - determined by the customer master record setting.

Ctr: Counterman number who opened the order.

PO: Customer Purchase Order – if the customer is setup with a blanket PO number, it will appear here.

Parts Entry Middle Area - Parts Entry

Part entry section is where you enter parts onto the order.

ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1									

ITM: Line-Item Number – each part line is assigned a line-item number.

Part Number: Each part is made up of a 3-character vendor code and the part number.

Opt: Option –when entering the quantity ordered you can enter options. These will be discussed later.

AVL: Availability – quantity of parts available for sale.

ORD: Order – quantity of parts being sold on this order

SHP: Ship – quantity of parts being shipped on this order.

B/O: Back Order – quantity of part that is back ordered.

Core: Core Price – if the part has a core price it will appear in the column.

Price: Customer Price

Extension: Extended customer price - price multiplied by Ship quantity. (B/O quantity not included.)

Parts Entry Line-Item Options - Quantity Ordered Followed by Option Letter

These letter options allow users to address a wide range of ordering scenarios, allowing for adjustments tailored to specific order requirements. Whether managing inventory constraints or implementing pricing changes, each option serves as a versatile tool for precise and flexible order customization.

B - Force Backorder: If your inventory is insufficient to fulfill a customer's request, you can force a backorder. For instance, if only 3 units are available, but the customer needs 5, input "5B." The system will ship the available 3 units and backorder the remaining 2.

This option is not available if "Force Ship" is enabled in the system settings. In this case, this process is automatic when a QTY is entered that is over the QOH.

Z - Backorder Entire Quantity: If a customer is willing to wait for the entire order to be fulfilled at once, use the "Z" option. For example, entering "5Z" will backorder the entire quantity of 5.

This option is not available if "Force Ship" is enabled in the system settings.

C - Core Return: When processing a core return for a refund, enter a negative (-) quantity followed by option "C" (e.g., -1C).

D - Change Description: Change the description of a part number on the current order or invoice only. This does not alter the description in the master record.

E - Core Exchange: For a customer bringing in a core during a part purchase (no negative), input option "C" (e.g., 1C) for an even swap.

L - Lost Sale Record: To record a lost sale due to cost or availability, input the quantity followed by option "L" (e.g., 1L). The lost sale is recorded for purchasing. Use (1X) to record the lost sale for purchasing without printing it on the customer's invoice.

M - Line-Item Message: Include a message below a part number on the invoice. Input the quantity followed by option "M" (e.g., 1M) and type the message. Default messages can be set up in the Line-Item Message File Maintenance under the Inventory File Maintenance Menu.

N - No Month-To-Date Update: Sell parts without updating the Month-To-Date Sales figures by entering the quantity followed by the letter "N" (e.g., 1N). Management controls this option.

P - Price Change: Change the price of a part by entering the quantity followed by option "P" (e.g., 1P). Provide user credentials and a reason for the price change. You can enter the new price directly or set the Gross Margin Percentage for the system to calculate.

Q - Special Order: For parts with no Quantity Available or not in the Inventory Master file, use the Special Order Logic. Add the part to a sales order with the quantity and option "Q" (e.g., 1Q).

R - Direct/Drop Ship: To directly ship/drop ship a part, enter the quantity followed by option "R" (e.g., 1R). This indicates the part needs to be ordered and shipped directly to the customer from the supplier, implying unavailability in your warehouse.

U - List Price Change: Change the list price of a part by entering the quantity followed by option "U" (e.g., 5U). You will be prompted to enter a new list price.

W - Warranty Return: For defective parts under warranty, use option "W"(e.g., 1W). This allows the customer to receive credit and places the defective part in the defective inventory for return to the vendor. Note that defective parts do not go back into regular inventory.

For warranty exchanges, where the customer is swapping a defective part for a new one, ensure to enter the new part on the same order. The resulting invoice will reflect as a zero-dollar invoice.

Part Entry - Part Search Methods

Numeric Search:

- Example: **/12**
- Finds parts like ABC72128, XYZ92-012B, etc.

Vendor Code Search:

- Example: **ABC/**
- Finds all parts for the ABC line, such as ABC72128, ABC1234, etc.

Combined Numeric and Vendor Code Search:

- Example: **ABC/12**
- Finds parts like ABC72128, ABC1234, etc.

Dot Prefix Search:

- Example: **.12**
- Conducts both /12 and .12 searches, finding parts like DEF555-12-AB or 12 OZ PAINT.

Description Keyword Search:

- Example: **.BEARING**
- Conducts both /BEARING and .BEARING searches, finding parts like KLM700-BR549 BEARING, MUFFLER

Vendor Code Search:

Example: ABC.
Equivalent to **ABC/**.

Combined Vendor Code Alias and Numeric Search:

Example: **ABC.12**
Finds parts like ABC9285 12 INCH BRACKET.

General Numeric Search:

Example: **12**
Performs both /12 and .12 searches.

General Keyword Search:

Example: **MUFFLER**
Performs both /MUFFLER and .MUFFLER searches.

Parts Entry Bottom Area - Screen Options

The options at the bottom of this screen are called up by pressing the appropriate function key or entering the value of F1, F2, etc. and then pressing ENTER.

f1=HoldOrd	f2=Refresh	f3=List%	f4=Comment	f5=Note	f6=VehSvc
f7=ShowOpt	f8=UnitSrch	f9=NoteCard			f12=Contcs

Parts Entry Screen Function Keys - Complete List

Let's explore the listed function key option selections located at the bottom of the Parts Entry Screen, providing valuable functionalities for efficient order management.

Feature availability may vary based on the system configuration, modules, or user permission settings.

F1 Hold Order

- Action: Places the current order on hold.
- Purpose: Quickly saves the order for later completion. The order can be recalled and finalized at a later time.

F2 Refresh

- Action: Refreshes the list of part numbers on the order.
- Purpose: Ensures all items on the order are accurately displayed, especially when lines change or new part numbers are added.

F3 List%

- Action: Displays part number line items with the gross profit percent (%).
- Purpose: Provides a comprehensive overview of gross profit percentages associated with each part.

F4 Comment

- Action: Allows entry of comments or pre-defined messages on the invoice.
- Purpose: Comments print on the invoice and pick tickets, offering customizable communication with customers.

F5 Note

- Action: Enables addition of an internal order note.
- Purpose: Internal order notes that **do not print** on the customer's invoice, facilitating internal communication.

F6 VehSvc

- Action: Converts the order into a shop repair order (availability varies).
- Purpose: Creates or edits a Vehicle Shop Work Order if the Vehicle Service module is installed.

F7 Heading (Show Options)

- Action: Refreshes the top portion of the order.
- Purpose: Often needed when Ship To or Bill To information is changed; displays available parts entry option.

P/N Field Options		Quantity Order Field Options	
HA	- Hose Builder	When entered as quantity sold plus option(s):	
//	- Recall Line Item	B	- Force Backorder
/	- Part Number Search	K	- Kit Sale
.TEXT	- Description Search	C	- Core Sale or Return
?	- Display Options	L	- Lostsale Line Item
		D	- Change Description
		M	- Enter Message
		E	- Core Exchange
		N	- No MTD Units Update
		F	- Force Ship

Quantity Order Field Options			
When entered as quantity sold plus option(s):		Without quantity:	
P	- Price Change	U	- Change List Price
Q	- Special Order	W	- Warranty Return
R	- Direct Ship	X	- Record Lost Sale
S	- Shop Use Item	Z	- Force Backorder
T	- Change Cost Price	A	- Application Info
		C	- Display Cost
		H	- Customer Purchase History
		I	- Interbranch Availability

F8 AutoCat or CFAST (Unit Search)

- Action: Performs a Catalog lookup of part numbers (availability varies).
- Purpose: A tool for cataloging part numbers.

F9 Notecard (IntNote)

- Action: Accesses an internal multi-use notes storage area for a specific customer.
- Purpose: Allows entry of notes for internal use only, **without printing on the invoice.**

F10 WOReq

- Action: Used to enter a shop work order request (availability varies).

F12 Contacts:

- Action: Shows the contact information for the customer account for updates and edits.
- Purpose: Allows addition or editing of customer contact information.

TOTALS Screen Summary - Order Entry Screen #3

The Totals Screen, denoted as Order Entry Screen #3, is a pivotal stage in the order entry process, offering a comprehensive overview of the order and providing essential functionalities for adjustments. This screen acts as a central hub for managing order total calculation details and ensuring accuracy in pricing, discounts, taxes, and freight charges.

Moving through the different Order Entry screens is a simple task. Once all the parts have been entered, you move from the Parts Entry screen by pressing ENTER instead of entering a part number. The Totals screen will display.

Users CANNOT navigate directly to Options screen from the Parts Entry screen. It is required to review the Totals screen.

11/03/20		920-555-3918		Order No: W1*400914		OPEN ORDER	
Ship To: BRANTLEY MANUFACTURING 477 WEST HWY 84 111053 DENVER, NC 28037				Bill To: BRANTLEY MANUFACTURING 477 WEST HWY 84 111053 DENVER, NC 28037			
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:10	P0:		
Total Parts/Labor.. 56.00 1. Order Discount.... 0.00% 0.00 2. Sales Tax..... 0.00 3. Outgoing Freight.. 0.00 4. Incoming Freight.. 0.00 Other Fees..... 0.00 5. Federal Excise Tax: 0.00 6. GL#.: 0.00 7. Fuel Surcharge.... <input checked="" type="checkbox"/> Y 8. Convenience Fee... <input type="checkbox"/> N 9. Battery Fee..... TOTAL ORDER: 56.00				ORDER SUMMARY			
				Weight Amount			
				Shipped: 0.00		56.00	
				B/O'd...: 0.00		0.00	
				Total...: 0.00		56.00	
				Other Fees			
				Shop Supplies...:		0.00	
				Env Fees.....:		0.00	

Tasks Accomplished on the Totals Screen:

- Sales Tax Calculation
- Application of Outgoing/Incoming Freight:
- Application of Discounts and Fees

Tax Calculation

When the Totals Screen initially displays, the following prompt will display at the bottom of the screen:

If the customer is flagged as a tax-exempt, this prompt will not display.

Is this order a (C)ounter pickup or a (D)elivery?:

- **(C)ounter pickup** – the customer will leave the store with the parts purchased.
- **(D)elivery** – the parts will be delivered to the customer, either by a carrier service or your delivery driver.

You are required to answer this prompt. The response to this prompt, sets the sales tax territory that will be used to calculate the sales tax for this order.

Order Totals Breakdown - Line-Item Overview

To access any line on this screen, enter the line number and press ENTER.

Total Parts/Labor..:		22.56	T
1. Order Discount....:	0.00%	0.00	
2. Sales Tax.....:	7.250%	1.64	
3. Outgoing Freight..:		0.00	
4. Incoming Freight..:		0.00	
Other Fees.....:		0.00	
5. Federal Excise Tax:		0.00	
6. GL#..:		0.00	
7. Fuel Surcharge....:			
8. Convenience Fee...:	N		
TOTAL ORDER:		24.20	

1. **Order Discount** – A discount percentage or discount amount can be entered. This discount will be applied to the Total Parts amount.
2. **Sales Tax** – The sales tax percentage will appear and the sales tax amount to be charged on this order.
3. **Outgoing Freight** – The shipping freight to deliver these parts to your customer.
4. **Incoming Freight** – The shipping freight that was charged to get the parts delivered to your store.
5. **Federal Excise Tax** – The FET to be charge on this order.
6. **GL#** - If the parts sales is to be posted to a GL account other than to the default GL account, enter the alternate GL account number here. (Often, this field is blocked from User Access.)
7. **Fuel Surcharge** – If your system is flagged to charge a fuel surcharge, the defined surcharge fee will appear on this line. To remove a surcharge amount will require access and a password.
8. **Convenience Fee** – If your system is flagged to charge credit card service fee, the fee to be charged will appear here. To remove a convenience fee will require access and a password.

Total Order – The final invoice amount.

OPTIONS Screen Summary - Order Entry

Screen #4 Overview

The Options Screen, identified as Order Entry Screen #4, serves as a versatile command center, providing users with a range of functionalities to tailor the order details and manage specific aspects of the transaction. From adjusting shipping methods to handling credit card transactions, the Options Screen empowers users with the flexibility to customize orders according to customer preferences and organizational requirements.

01/15/23		407-314-8724		Order No: W1*401603		OPEN ORDER	
Ship To: CAROLINA FLEET 1000 PALACE PARK LANE 1036-1 P.O. BOX 876 WINTER SPRINGS, FL 32708 USA				Bill To: CAROLINA FLEET 1000 PALACE PARK LANE 1036 P.O. BOX 876 WINTER SPRINGS, FL 32708 USA			
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0		PO:	
1. Salesman.: BLM - BART MICHAELS 2. Ship Via.: - 3. Spcl Inst:				Option: Y = Invoice P = Pick Ticket A = Add Parts H = Hold T = Totals Q = Quotation X = Cancel Order B = Backorder I = Issue PO			
4. Check Nbr: Drv. Licn: \$24.20 Phone Nbr:				K = Ack'ment G = Get Apprvl V = View Notes TN= PkgTrack# N = Signature D = Del'Driver			
5. Release #:		Attn:		Truck No.			
F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=PO# F10=Attn F11=Trk#							

Tasks Accomplished on the Options Screen:

- Shipping Selection
- Invoicing
- Quotes
- Payment Processing
- Printing
- Pick Tickets
- Packing Slips
- Invoices

Options Screen – Numbered Field Items

1. **Salesman.:** The customer's assigned salesman.
2. **Ship Via.:** How the parts will be delivered to the customer. Entering a ? will display the list of defined ship via codes that can be selected.
3. **Spcl Inst:** You have two lines of special instructions that can be entered and will print on the invoice.
4. **Check, Drv. Licn, Phone Nbr:** This information should be entered if the payment is received via a personal check.

If the order payment term is a credit card term, the prompts at option 4 will change:

Credit Crd, CC Status, Approval: This information will be added by the system if you have integrated credit card processing turned on.

5. **Release #:** if there is a blanket PO for the customer, there may a release number to be entered here.

Options Screen - Bottom F Keys

F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=PO# F10=Attn F11=Trk#

F5=Payment – if the customer is paying cash, you can enter the cash amount received and the change amount to be returned to the customer will be displayed.

F6=ShipTo – To enter an alternate ship-to address.

F7 = BillTo – to select a new Bill-To customer for this sales order. When the Bill-To customer is changed, you will be asked to enter a new Ship-To customer. When a Ship-To customer is changed, the customer prices for the parts on the order will be changed. As the part amount might change, the sales tax will have to be recalculated. For this reason, your screen will go back to the Totals screen.

F8 = Terms – this option will allow you to change the payment terms of the sales order. You can press a ? at this option to see the list of defined payment options. Please note that if the customer's payment terms that is an A/R term, then only cash, check or credit card payment terms will be eligible for selection.

F9 = PO# - allows you to enter a customer PO number.

F10 = Attn – allows you to enter a name for whom the order delivery should be sent.

F11 = Trk# - assign the customer's truck number the purchase if for.

Options Screen - Letter Options

Option:	
Y = Invoice	K = Ack'ment
P = Pick Ticket	G = Get Apprvl
A = Add Parts	V = View Notes
H = Hold	TN= PkgTrack#
T = Totals	N = Signature
Q = Quotation	D = Del'Driver
X = Cancel Order	
B = Backorder	
I = Issue PO	

Y = Invoice Prints this order as a completed Invoice. Additional parts can Not be added to this order. It can be recalled for other changes such as in the freight, sales tax, and special handling fields, as well as shipping specifications.

P= Pick Ticket Prints this order as a Pick Ticket. The order remains in the system and can be recalled. The order can have parts added as well as any other option available to a new order.

A = Add Parts Returns the user to Parts Entry (Screen 2) to add additional parts to the order. The system will bring the user through the Totals screen (Screen 3) then back to this screen.

H = Hold Places the order on Hold. This "Saves" the order. The order can be later retrieved for further edits and to complete. Inventory remains reserved.

T = Totals Returns the user to the Totals screen (Screen 3), to make changes to freight, sales tax, shipping and handling changes, and more.

Q = Quotation Order will print as a quote. Quotes do not affect inventory, which is not the same for Invoices, Pick Tickets, Packing Lists, and orders placed on Hold.

X = Cancel Order Will cancel the order just created. Can not be canceled after invoice.

B = Backorder Places the entire order on Backorder. Once shipments arrive, the order can be recalled and invoiced.

I = Issue PO Issues a PO for part numbers that were entered in with option Q.

K= Ack'ment Sends an Acknowledgement to the customer. This is based on the Y/N flag set in the customer file maintenance for "Send Ack?".

G = Get Apprvl Schedules the request for a PO from the customer via EDI.

V= View Notes View notes that have been recorded for the customer for Order Entry, Picking Ticket or Invoicing.

TN = PkgTrack# Enter in all the tracking information related to how the order shipment.

D = Del'Driver Assign a driver to deliver this order. This option is only available if the Driver Delivery system module is enabled.

Order Creation

Tasks:

- Account Lookup
- Adding Parts to an Order
- Part Searching when Creating an Order
- Backorder Quantity
- Adding Special Order Parts

Start an Order

The first screen that displays in order entry is shown below: This is known as the Lookup Screen.

06/26/19		Order No: w1								
Ship To:										
Terms:				Ctr:			PO:			
ITM	Part Number		AVL	ORD	SHP	B/O	Core	Price	Extension	
Account No: █										
f1=Recall		f2=Search		f3=OpenOrd		f4=CustInq		f5=PartInq		f6=Credit
f7=HistInq		f8=CoreInq		f9=CSR		f10=NewAcct		f11=AddInfo		f12=Notes

Account Number Lookup

If you or the customer knows the account number, enter the account number at the "Account No:" prompt and press Enter.

If the account number is unknown, you can perform a search for the account number.

F2 Search

Pressing F2 initiates the search functionality, providing you with the flexibility of employing four distinct methods to search for a customer's account or an order. These methods cater to diverse search criteria, ensuring a comprehensive and efficient retrieval process.

Let's explore each method:

- **Method 1: Customer's Name**

You can enter a partial segment of the customer's business name to conduct a targeted search. For instance, if you were searching for the account "REEDY CREEK FLEET," here are examples of what you could enter for your search:

- R
- REE
- CRE
- C
- FLE
- Reedy
- Fleet
- Creek
- Reedy Creek

- **Method 2: Customer's Business Zip Code**

Enter the business's zip code to narrow down the search and locate the desired account or order.

- **Method 3: Customer's Business City Name**

Specify the business city name to refine your search and retrieve relevant customer accounts or orders.

- **Method 4: Last 4 Digits of the Customer's Business Account Number**

If you have the last four digits of the customer's business account number, enter them to precisely locate the account or order.

Search Example

For this example, let's consider **Method 1** and enter a partial name for the search.

1. Input the relevant partial segment of the customer's business name and press Enter.

06/26/19		Order No: W1						
Ship To:								
Terms:		Ctr:	PO:					
ITM	Part Number	AVL	ORD	SHIP	B/O	Core	Price	Extension
Enter Name: SUNSHINE								

2. After initiating the search, a search results window will show a list of customer accounts matching the criteria.

Customer Search window showing search results for 'SUNSHINE'. The search string is 'SUNSHINE' and 1 customer is found. The results table is as follows:

CUSTNO	BR	NAME	CITY	ST	ZIP	PHONE
619000	W6	SUNSHINE GRADING	ROSWELL	GA	30075	770-555-7445

Click on row to select customer, or press <Enter> customer highlighted.

Select Cancel

3. Select the account from the results. You'll return to the Order Entry Lookup Entry Screen, and will be prompted for your operator number.

06/26/19		Order No: w1							
Ship To:									
Terms:					Ctr:		PO:		
ITM	Part Number		AVL	ORD	SHP	B/O	Core	Price	Extension
Account No: 619000 SUNSHINE GRADING Your No:									

4. Once you input a valid customer account number and operator number, the Parts Entry screen will display, where you now can proceed to add items to the order.

Customer Has Open Orders on File

If a customer has current open orders, a prompt will display at the bottom of the screen – **Customer has # orders on file. See them? (Y,N): N**

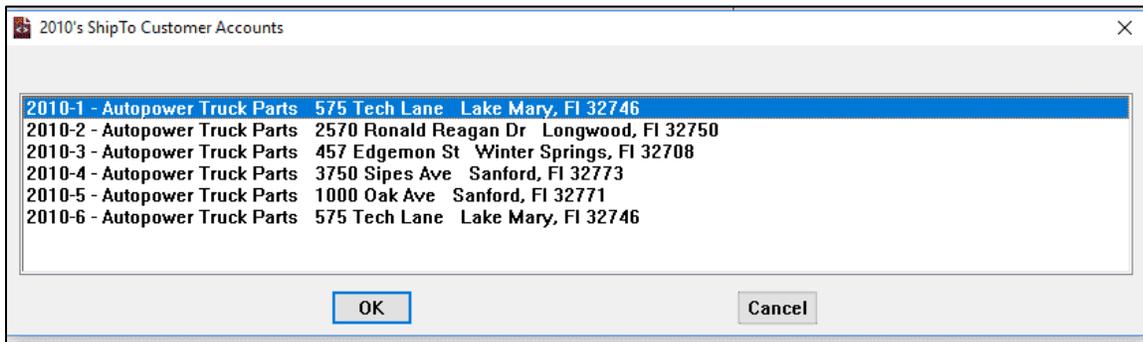
- The default option is **N for No**. Press ENTER and you will continue with creating a new order.
- To see the open orders, input **Y for Yes** and press ENTER. Select an order by entering the corresponding line-item number and pressing ENTER.

06/26/19		Order No: w1							
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075									
Terms: A-NET 30 DAYS					Ctr:		PO:		
Item	Loc	OrderNo	TR	ST	Date	PO Number	PT	Ctr	Shipto-Customer
1.	w1	366332	DI	O	10/04/18	N		0	619000 - SUNSHINE GRAD
2.	w1	400366	DI	O	06/26/19	N		0	619000 - SUNSHINE GRAD
3.	w1	400367	DI	O	06/26/19	N		0	619000 - SUNSHINE GRAD
Enter Item, (B)ack, or press <Enter>: █									

Selecting a Ship-To Account

For Customers that have multiple company locations, you'll be prompted to select a Ship To account for the customer when you create an order.

1. On the Look Up screen, enter the customer's Bill-To account (e.g., 2010) and press ENTER.
2. The Ship-To locations associated with the Bill-To account will be displayed. Select a Ship-To account and click OK.



Ship To accounts VS. Bill To accounts:

Bill To: Remains the same for all orders for the customer. This is where the invoice will be sent.

Ship to: Can be changed based on where the order needs to be shipped.

Example Setup: Customer #2010 has six business locations.

This would be the set up this customer in the Customer A/R record:

- Customer number, 2010 (Bill-To Customer),
- Using sequential numbering for Ship-To account numbers (dash-1, dash-2, etc.) Ship-To customers 2010-1, 2010-2, 2010-3, 2010-4, 2010-5, and 2010-6 are associate to the Bill-to Customer.

Adding Parts to an Order

Start the Process: Enter the part number (e.g., ABC11111) with the vendor code (e.g., "ABC") and press ENTER to add it to the order.

A line-item is created for the entered part number, and a new line begins, waiting for more parts to be added.

06/26/19 INFO 770-555-7445 Order No: WL*40036/ OPEN ORDER									
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON					No Prior Purchase History				
Terms: A-NET 30 DAYS			TAXABLE	B/O OK	Ctr:0		PO: N		
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 11111	15	4				0.00	23.00	
SPARK PLUG... L=23.00 F=28.75 GM=100.00% BTN: UNK									

Review Part Information

Once added, you can input an order quantity (e.g., "2") in the ORD column and press ENTER to calculate the shipping quantity, backorder quantity, and extended price.

- **Pricing:** Customer pricing is determined a pricing matrix. The screen displays the part's description, pricing levels, and gross margin percent based on the parts product master record and customer pricing matrix.
- **Available Quantity (AVL):** The AVL column shows the inventory availability; for example, in the example screen there are 4 parts available.

06/26/19		770-555-7445		Order No: w1*400367		OPEN ORDER			
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON				Ship Total.: 46.00 Order Total: 46.00 GM%.....: 100.00%					
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0		PO: N			
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 11111			2	2	0	0.00	23.00	46.00
2									

Part Number ABC11111 has 4 units available for sale, with 2 ordered, that will 2 ship, and no backorders.

If your customer intends to purchase additional parts from the ABC Product line, you can simply enter the part number on the next line without re-entering the Vendor Code

Adding Another Part from the Same Vendor

Using the Same Vendor Code: If you want to add another part from the same vendor line, you can use the "." search command to find more parts from the same vendor.

Expanding Search: To search for parts beyond the initial vendor code, press SPACE before the "." search command.

Adding a Part from a Different Vendor Product Line

Entering Part and Quantity: Type in the new part number and the desired order quantity in the ORD column to add a part from a different vendor.

Part Search Methods in Order Entry

To search and locate parts to add to an order in Parts Entry, you can utilize the following search methods...

Vendor Specific Search

Enter the vendor code followed by a slash (e.g., ACC/) in the Part Number field.

- The system will display results for Stocked and Non-Stocked parts for the specified vendor code. Default display shows part numbers, descriptions, and quantity on hand.
 - Select a part for your order by entering the line-item number, then pressing ENTER.

06/26/19		407-695-2284		Order No: w1*400374											
Ship To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701			Bill To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701												
Terms: G-CASH	TAXABLE	B/O OK	Ctr:0		PO: REQUIRED										
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension						
1	ACC/														
f1=HoldOrd						f2=Refresh		f3=List%		f4=Comment		f5=Note		f6=VehSvc	
f7=ShowOpt						f8=UnitSrch		f9=NoteCard				f12=Contcs			

48 Stocked (59 Non-Stock) for "ACC/"							
Item	Vnd	Part Number	Description	QOH	Avl	QOO	OthAvl
1.	ACC	10w40OIL	10w40 OIL	0	0	168	0
2.	ACC	23123	*NOT ON FILE*	0	-2	2	0
3.	ACC	2323	*NOT ON FILE*	0	0	0	0
4.	ACC	235487	*NOT ON FILE*	0	0	0	0
5.	ACC	235689	*NOT ON FILE*	0	0	0	0
6.	ACC	23654	*NOT ON FILE*	0	-1	1	0
7.	ACC	254897	*NOT ON FILE*	5	5	0	0
8.	ACC	25668	ACCURIDE 20"x8" 10 HOLE	2	2	0	0
9.	ACC	27403	22.5x7.5 ACCURIDE WHEEL	8	8	0	0
10.	ACC	27403E	22.5"x7.5" 10 HOLE DCN W	9	8	24	15
11.	ACC	27404	ACCURIDE 22.5x8.25 DCN G	10	6	0	30
12.	ACC	27404E	22.5x8.25 WHITE DCN WHEE	0	0	0	0
13.	ACC	27404PW	22.5x8.25 WHITE DCN WHEE	74	46	0	113
14.	ACC	27406E	24.5x8.25 WHITE DCN WHEE	6	6	8	77
15.	ACC	28112	WHEEL 17.5x6.75 10 HOLE	0	0	20	4
16.	ACC	28112E	17.5x6.75 10 HOLE WHITE	0	-4	6	49
17.	ACC	28145E	ACCURIDE 17.5x6.75 6 HOL	0	-2	4	28
18.	ACC	28157	22.5x6.75 FORD WHEEL 6 H	8	2	3	5

Select Item#, (F)wd, (B)wd, (N)on-(S)tock, (A)ll, or (E)xit:

Vendor-Specific - Partial Part Number

To search for a specific part with a partial part number and vendor code, type the vendor code followed by a slash and the partial part number sequence (e.g., ACC/27404), then press Enter.

- All parts containing the search criteria of ACC/27404 will be returned and displayed on the screen.
 - Select a part to add to order by entering the line-item number, then press Enter.

06/26/19		407-695-2284		Order No: WI*400374					
Ship To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701			Bill To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701						
Terms: G-CASH	TAXABLE	B/O OK	Ctr:0		PO: REQUIRED				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ACC/27404								
f1=HoldOrd f2=Refresh f3=List% f4=Comment f5=Note f6=VehSvc f7=ShowOpt f8=UnitSrch f9=NoteCard f12=Contcs									

3 Stocked (0 Non-Stock) for "ACC/27404"									
Item	Vnd	Part Number	Description	QOH	Avl	QOO	OthAvl		
1.	ACC	27404	ACCURIDE 22.5X8.25 DCN G	10	6	0	30		
2.	ACC	27404E	22.5X8.25 WHITE DCN WHEE	0	0	0	0		
3.	ACC	27404PW	22.5X8.25 WHITE DCN WHEE	74	46	0	113		
END OF LIST									
Select Item#, (F)wd, (B)wd, (N)on-(S)tock, (A)ll, or (E)xit: █									

Vendor-Specific - Part Description

To find a part in a vendor line by part description, enter the vendor code followed by a period and the description keyword (e.g., "ACC.WHEEL").

- All results under the vendor code ACC with "Wheel" in the description will be returned on the results list.
 - Select a part for the sales order by entering the associated line-item number and pressing ENTER

06/26/19		407-695-2284		Order No: w1*400374						
Ship To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701			Bill To: HEGEMAN TRUCKING CO. 9840 FALLING ROCK RD 401675 ALTAMONTE SPRINGS, FL 32701							
Terms: G-CASH	TAXABLE	B/O OK	Ctr:0		PO: REQUIRED					
ITM	Part Number	OPT	AVL	ORD	SHF	B/O	Core	Price	Extension	
1	ACC.WHEEL									
f1=HoldOrd		f2=Refresh		f3=List%		f4=Comment		f5=Note		f6=VehSvc
f7=ShowOpt		f8=UnitsRch		f9=NoteCard						f12=Contcs

28 Stocked (45 Non-Stock) for "ACC.WHEEL"

Item	Vnd	Part Number	Description	QOH	Avl	QOO	OthAvl
1.	ACC	27403	22.5X7.5 ACCURIDE WHEEL	8	8	0	0
2.	ACC	27403E	22.5"x7.5" 10 HOLE DCN W	9	8	24	15
3.	ACC	27404	ACCURIDE 22.5X8.25 DCN G	10	6	0	30
4.	ACC	27404E	22.5X8.25 WHITE DCN WHEE	0	0	0	0
5.	ACC	27404PW	22.5X8.25 WHITE DCN WHEE	74	46	0	113
6.	ACC	27406E	24.5X8.25 WHITE DCN WHEE	6	6	8	77
7.	ACC	28112	WHEEL 17.5X6.75 10 HOLE	0	0	20	4
8.	ACC	28112E	17.5X6.75 10 HOLE WHITE	0	-4	6	49
9.	ACC	28157	22.5X6.75 FORD WHEEL 6 H	8	2	3	5
10.	ACC	28157E	22.5X6.75 WHITE WHEEL 6-	0	0	1	0
11.	ACC	28192E	22.5"x9" 3.12" OFFSET D.	5	5	0	9
12.	ACC	28215PW	WHEEL	0	0	1	0
13.	ACC	28408	ACCURIDE 22.5X8.25 10 HO	2	2	0	20
14.	ACC	28408E	22.5 x 8.25 WHEEL 10 HOL	0	0	0	0
15.	ACC	28408PW	22.5 x 8.25 WHEEL 10 HOL	240	173	323	275
16.	ACC	28409E	24.5 x 8.25 WHEEL 10 HOL	97	97	0	114
17.	ACC	28440E	22.5X8.25 WHITE WHEEL 33	5	5	0	0
18.	ACC	28487E	225X825 WHD-10 5 HAND HO	145	145	0	29

Select Item#, (F)wd, (B)wd, (N)on-(S)tock, (A)ll, or (E)xit: █

Incorrect Part Number

If you enter the incorrect part number and press ENTER, you will encounter the following screen that offers search method examples.

```
Search Examples:

/12          finds "ABC72128", "XYZ92-012B", etc.
ABC/        finds all parts for "ABC" line
ABC/12      finds "ABC72128", "ABC1234", etc.

.12         finds "DEF555-12-AB" or "12 OZ PAINT"
.BEARING    finds "KLM700-BR549 BEARING, MUFFLER"
ABC.        is the same as "ABC/"
ABC.12     finds "ABC9285 12 INCH BRACKET"

12          does both "/12" and ".12" searches
MUFFLER     does both "/MUFFLER" and ".MUFFLER" searches

"ABC11" not found.  Enter another search:
```

Note: If you realize the part number is incorrect before pressing ENTER, you can simply backspace over the part number and re-enter it.

Once you press ENTER with the incorrect part number, a question appears at the bottom of the screen: "Is ABC11 a Special Order? (Y, N):"

- Choosing 'N' returns you to the part entry screen in Order Entry.

More Part Search Methods

Numeric Search:

- Example: **/12**
- Finds parts like ABC72128, XYZ92-012B, etc.

Vendor Code Search:

- Example: **ABC/**
- Finds all parts for the ABC line, such as ABC72128, ABC1234, etc.

Combined Numeric and Vendor Code Search:

- Example: **ABC/12**
- Finds parts like ABC72128, ABC1234, etc.

Dot Prefix Search:

- Example: **.12**
- Conducts both /12 and .12 searches, finding parts like DEF555-12-AB or 12 OZ PAINT.

Description Keyword Search:

- Example: **.BEARING**
- Conducts both /BEARING and .BEARING searches, finding parts like KLM700-BR549 BEARING, MUFFLER

Vendor Code Search:

- Example: ABC.
- Equivalent to **ABC/**.

Combined Vendor Code Alias and Numeric Search:

- Example: **ABC.12**
- Finds parts like ABC9285 12 INCH BRACKET.

General Numeric Search:

- Example: **12**
- Performs both /12 and .12 searches.

General Keyword Search:

Example: **MUFFLER**

Performs both /MUFFLER and .MUFFLER searches.

Backorder Entry

Let's use an example scenario to explain how the back ordering feature in Order Entry works. Suppose Sunshine Grading, a customer, wishes to purchase 12 of a part number (e.g., ABC1111), but we only have 10 available. If the customer accepts backorders, follow these steps:

Part Number Entry

- Type in part number ABC1111 and press ENTER. The cursor will be in the ORD column.

Backorder Quantity

- Enter the quantity of 12 in the ORD column and press ENTER.
 - The B/O column will populate with the backordered quantity of 2.
 - This entry ships a quantity of 10 and backorders 2.

06/26/19		770-555-7445		Order No: w1*400367					
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON				No Prior Purchase History					
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0		PO: N			
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 11111			2	2	0	0.00	23.00	46.00
2	ABC 1111		10	12			0.00	8.56	
SPARK PLUG WIRE... L=8.56 GM=100.00%									

06/26/19		770-555-7445		Order No: w1*400367						
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON						Ship Total.: 131.60 Order Total: 148.72 GM%.....: 100.00%				
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0				PO: N		
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension	
1	ABC 11111			2	2	0	0.00	23.00	46.00	
2	ABC 1111			12	10	2	0.00	8.56	85.60	
3										
f1=HoldOrd		f2=Refresh		f3=List%		f4=Comment		f5=Note		f6=VehSvc
f7=ShowOpt		f8=UnitSrch		f9=NoteCard						f12=Contcs

Backorder Entire Quantity

- If you want to backorder the entire order quantity of 12 parts, type in the quantity of 12 followed by the option "Z" and press ENTER.
- This will backorder the entire order quantity, and no parts will be shipped, as shown in the example.

06/26/19		770-555-7445		Order No: w1*400367		OPEN ORDER				
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON						No Prior Purchase History				
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0				PO: N		
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension	
1	ABC 11111			2	2	0	0.00	23.00	46.00	
2	ABC 1111			10 12Z			0.00	8.56		
SPARK PLUG WIRE... L=8.56 GM=100.00%										

06/26/19		770-555-7445		Order No: WI*400367		OPEN ORDER				
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON						Ship Total.: 46.00 Order Total: 148.72 GM%.....: 100.00%				
Terms: A-NET 30 DAYS		TAXABLE	B/O OK		Ctr:0		PO: N			
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension	
1	ABC 11111			2	2	0	0.00	23.00	46.00	
2	ABC 1111	Z		12	0	12	0.00	8.56	0.00	
3										
f1=HoldOrd		f2=Refresh		f3=List%		f4=Comment		f5=Note		f6=VehSvc
f7=ShowOpt		f8=UnitSrch		f9=NoteCard						f12=Contcs

Complete Backorder

- Continue creating the order as normal, taking it through the full order entry process, finishing by invoicing the order.

Note: Backorder/ Force ship functions may be disabled. Management controls this option.

Special Order Parts

When adding a part to a sales order that is not in your inventory, you'll encounter the Special Orders process. Let's walk through the steps:

Prompt for Special Order

- If the part entered (e.g., ABC6589) is not in the system inventory, you'll be asked, *"Is 'ABC6589' a Special Order? (Y, N):"*
 - **Answering 'N' (No):** Choosing 'N' returns you to the order for the correct part number entry.
 - **Answering 'Y' (Yes):** Choosing 'Y' returns you to the order for entering the ORD quantity. Once entered and you press ENTER, the Special Order window displays.

06/27/19		920-555-5922		Order No: W1*400389					
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206				No Prior Purchase History					
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0			PO: 57173		
ITM	Part Number	AVL	ORD	SHP	B/O	Core	Price	Extension	
1	ABC 6	Special Order for ABC6589							
		1. Description.....:							
		2. Part Cost.....:							
		3. Selling Price...:			0.00%				
		4. List Price.....:							
		5. Core Price.....:		0.00					
		6. Core Cost.....:							
		7. Supplier No.....:							
		8. Charge Freight...:			9. DirShip: N				

Special Order Details

For a new part, enter the required values:

- Description: Briefly describe the part.
- Part Cost: Enter the cost from your supplier.
- Selling Price: Computed automatically; you can also key in a selling price.
- List Price: Computed automatically; you can also key in a list price.
- Core Price: Enter the core price if applicable.
- Core Cost: Enter the core cost if applicable.
- Supplier No: Enter the supplier code.
- Charge Freight: Y (yes) or N (no).
 - If you answer 'Y' to Charge Freight, you'll receive a reminder to add freight to the sales order before finalizing.
- DirShip: Y (yes) or N (no).
 - If you answer 'Y' to DirShip, the ship-to address on the Purchase order will match the sales order, and inventory

Warnings for Core Price/Cost

- You'll receive warnings if there is no core price or cost. If your part doesn't have a core, acknowledge these warnings.

Completing Special Order Entry

- Once the special-order entry is done, the part will show on the order with a back-ordered quantity (B/O).
- Notice the SHP quantity is 0, and the order quantity is in the B/O column.

06/27/19		920-555-5922		Order No: W1*400389		OPEN ORDER			
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206				Ship Total.: 0.00 Order Total: 44.10 GM%.....: 33.33%					
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0		PO: 57173			
ITM	Part Number	OPT	AVL	ORD	SHR	B/O	Core	Price	Extension
1	ABC 6589	FPQ		1	0	1	0.00	44.10	0.00
2	█								
<p>f1=HoldOrd f2=Refresh f3=List% f4=Comment f5=Note f6=VehSvc f7=ShowOpt f8=UnitSrch f9=NoteCard f12=Contcs</p>									

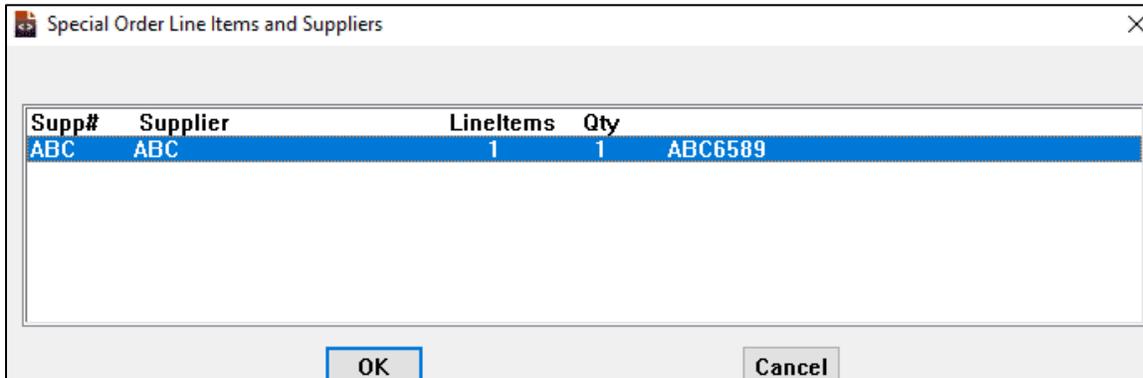
Proceed to Order Entry Totals and Options

- Continue adding other items to your sales order.
- Once all parts are added, proceed to the Totals and Options screens.
- On the Options screen, enter option I to Issue a PO (Purchase Order).

06/27/19		920-555-5922		Order No: W1*400389		OPEN ORDER	
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206				Bill To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206			
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0		PO: 57173	
1. Salesman.: CIHS - CHARLOTTE INSIDE HOUSE 2. Ship Via.: 01 - CUST PICK-UP 3. Spcl Inst: 4. Check Nbr: Drv. Licn: \$0.00 Phone Nbr: 5. Release #:				Option: I Y = Invoice G = Get Apprvl P = Pick Ticket V = View Notes A = Add Parts TN= PkgTrack# H = Hold N = Signature T = Totals D = Del'Driver X = Cancel Order B = Backorder <u>I = Issue PO</u> K = Ack'ment			
Attn:		Truck No.					
F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=PO# F10=Attn F11=Trk#							

Supplier Selection

- After entering the special-order details, a window appears listing all suppliers for the special-order line items.
- Use the mouse or the UP/DOWN arrow keys to highlight the supplier.
- Click the OK button.



Manually Create/Adjust a Purchase Order

- Selecting a supplier opens the program for Manually Creating/Adjusting a Purchase Order.
- The special-order line item will be included in the purchase order created.

ON HOLD		Manual Purchase Order - Part Entry				PO-NMAN	
PO Number.....: 400389-1		Supplier: ABC					
Total Value...: 29.40							
Total Weight..: 0.00 lbs							
Vnd PartNumber	Description	UM	Qty	C.Cost	P.Cost	Ext.Cost	
ABC 6589	SPARK PULG CLEA		1		29.40	29.40	
QOO:0	QOH:0	Min:0	MTD:0	S2:0	Avg3:0.0	LstSales:0	POP:
SPK:0	CBO:1	Max:0	S1:0	S3:0	Avg12:0.0	LastSale:	
(A)dd, (D)elete, (F)ind, (R)efresh, quantity (##), (Q)VT, or (E)xit (F5)Edit, (F6)Min/Max, (F7)OvrStk, (F8)Inquiry, (F9)F/M, (F10)ByrNotes							

Purchase Order Number

- In this example, the sales order number is W1400389, and the created purchase order is numbered W1400389-1.
- If there were multiple special order lines with unique suppliers, additional purchase orders would be -2, -3, and so forth.

Return to Sales Order

- After issuing the special order purchase order, you return to the sales order.
 - If the only part line is the special order, select option H (hold) and proceed with the next sales order.
 - If there are other line items, proceed with invoicing. The special order line item(s) and other backordered items will be built onto a child sales order of the original order number.

Update to Ready-to-Ship

- Once special order purchase orders are issued and received, the sales order line item updates to show the part is ready to be shipped and no longer backordered.

06/27/19		920-555-5922		Order No: w1*400389		OPEN ORDER			
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206				Bill To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206					
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0	PO: 57173				
ITM	Part Number	OPT	AVL	ORD	SHF	B/O	Core	Price	Extension
1	ABC 6589	FPQT		1	1	0	0.00	44.10	44.10
2	LUB AF1618			2	2	0	0.00	24.76	49.52
(A)dd, (C)omment, (N)ote, (T)otals, (Y)MM, (E)xit, ? █ Order Notes are present.									

AutoMail Notification

- When the special order PO is posted to inventory, an AutoMail message notifies the operator of the received special ordered part.
- If freight is selected on the special order, it reminds the operator to charge freight to the customer.

From:	AUTOPOWER
To:	AUTOPOWER
Message:	<p>Special ordered part, ABC6589, on order # W1*400389 for customer HAYDEN FARM EQUIPMENT has been received on PO # 400389-1.</p> <p>This part has been updated with quantity 1.</p> <p>Thank you.</p>
<input type="button" value="Compose"/> <input type="button" value="Reply"/> <input type="button" value="Print"/> <input type="button" value="Send"/> <input type="button" value="Discard"/> <input type="button" value="Close"/>	

Finalize the Special Order

With the special order completed and received, you can now finalize the sales order.

Order Modification

Tasks:

- Line-Item Recall
- Part Quantity Editing
- Price Change
- Deleting Parts
- Placing an Order on Hold
- Recall an Order

Line-Item Recall: Step by Step

If there is a need to modify quantities or apply sale options to a part that has already been added to the order, you can utilize the "Line Item Recall" feature. This functionality allows you to recall specific line items for necessary adjustments.

To recall a line item on an order to apply changes, follow the outlined steps below.

1. In the part entry field, input "/" followed by the number of the line item you wish to recall. (For instance, to recall line-item number 1, type "/1.")
2. Press Enter; the line item will display on the entry line. The user can now make modifications to quantity or apply sale options.
3. Make necessary adjustments based on your requirements.
4. Press ENTER to confirm the change.

Edit Order Quantity: Step by Step

If the need arises to modify an order by adjusting the order quantity of a specific part, follow the outlined steps below:

This example will illustrate the process by increasing the order quantity from 2 units to 1 unit:

1. **Navigate to the part number entry field.**
2. **Recall the Line Item for Editing:** Type "/1" to recall line item #1 for editing. The part number for line #1 will display in the entry field.
 - If you need to edit a different line item, replace "/1" with the appropriate line-item number, such as "/5" for line item #5
3. **Modify the Quantity:** Change the quantity to the desired value. For example, change it from 2 units to 1 unit.
4. **Confirm the Changes:** Press ENTER to confirm the changes.

Price Change: Step by Step

Followed these outlined steps to make a change to the pricing for 1 line item on an order:

- 1. Add A Part to the Order:** Create an order and enter the part number to add it to the order. You can also use the line-item recall to price change a part that's already added to the order.
- 2. Input Quantity and Option Prompt for Price Change:** In the ORD column, input the order quantity followed by "P" and press ENTER. The price change window will display.
 - For example, to order 3 parts, enter "3P" to prompt a price change.

You may be prompted to type in your operator number and a price change authorization password.

- 3. Choose a Price Change Method:** Choose one of three options to change the price:
 - Enter the new price directly.
 - Or, key in the desired margin percentage.
 - Or, enter a multiplier to calculate the new price by percentage.

06/27/19		407-695-7300		Order No: w1*400380					
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				No Prior Purchase History					
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 1	Class: L +0% Current Price: 17.96 New Price: 16.50 New Core: 0.00 Reason: price matching			Last Sale : Last Price: Current Core: 0.00 Multiplier: 1.8376 Multiplier: 1				
COIL WIRE... L=17.96 GM=50.00%									
Accept? (Y,N): <input checked="" type="checkbox"/>									

- 4. Confirm Price Change:** When prompted, press Y to accept the price change. (Press N to cancel.) You will be prompted to enter a reason for the Price change.

Delete Part from Order: Step by Step

1. Recall the line by entering "/" and the line-item number.
2. Once the recalled line item is on the screen and your cursor is in the ORD column, enter "X" and press ENTER.
3. This action will remove the line item from the sales order.

06/26/19		770-555-7445		Order No: W1*400367					
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON				No Prior Purchase History					
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0				PO: N	
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 11111			2	2	0	0.00	23.00	46.00
2	GYR 17581			1	1	0	0.00	24.90	24.90
3	POL 12-707			1	1	0	0.00	6.81	6.81
2	GYR 17581		9 x	1	1	0	0.00	24.90	24.90
AUTO V-BELT... L=24.90 GM=65.42%									

Order Options

Order options provide a flexible way to tailor and modify orders according to customer needs. These options can be applied either during the addition of a new part to an order or when recalling a specific line item of a part previously added to the order

Recall line item

//1 On the Parts Entry screen, input "/" followed by the number of the line you wish to recall. (e.g., To recall line item number 1, type "//1.")

Applying Order Options

Type the order quantity followed by the letter(s) representing the option you are applying to the line item. Example: To sell 3 items, enter a line-item message and make a price change, type 3MP in the Qty field.

SALES OPTIONS

Backorder

- B Backorder the part's quantity when not available
- Z Backorder all quantity ordered

Cores

- C Core sale only
- E Core exchange

Cost & Pricing changes

- P Price change
- U List price change

Lost sales

- L Records lost sale and prints the part number on invoice
- X Records lost sale but does not print the part number on invoice

Special ordering options

- N No month-to-date sales update
- Q Special Orders (Creates purchase order)

Printing text on invoice

- D Change Part Description that prints on invoice
- M Line-item message – insert a message that prints on invoice below part number

RETURN OPTIONS

- 1C Core return (Creates core return with quantity of 1) Core will be added to the dirty core inventory
- 1 Part return (Creates a part return with quantity of 1) Part will be returned to saleable inventory
- 1W Warranty & defect part returns (Part will be added to the defective inventory)

If the part is defective and the customer is exchanging it for another part (warranty exchange); be sure to enter the new part being exchanged on the same order. This invoice will reflect as a zero-dollar invoice.

SHIPPING OPTIONS

- F Force ship the quantity ordered
- R Direct/Drop ship the quantity ordered

CHANGE OPTIONS

Delete a Line/Part Off Order

- X First recall the line to be deleted, then type "X" in the Quantity field and press ENTER.

Change Part

- A# If alternate parts display, choose a part number, then type "A" followed by a number indicating which alternate part
- S# If superseded parts display, choose a part number, then type "S" followed by a line number indicating the supersede part

INFO OPTIONS

In the Quantity field, type the letter representing the option you are applying (with no quantity) and press enter.

Example: Type the letter "C" to display the cost of the part.

- A View part application information
- C Displays the part cost
- I View part quantity on hand in other branches
- F5 Inventory inquiry for part number online item

Place Orders on Hold

When in the process of creating an order and the need arise to save the order for later access, follow this straightforward process.

1. While on the Parts Entry screen and with your cursor in the parts entry field, press F1 to choose the "Hold Order" option located at the bottom of the screen.
2. This action will effectively place the order on hold and brings you back to the Look Up screen.

Your order is now stored for easy retrieval later. When you're ready to proceed with the order, you can Recall it from the Look Up screen.

Recalling Orders: Three Methods

If you are ready to retrieve and order that has been placed on hold, there are 3 methods you could use to recall it.

On the Order Entry Look Up screen, these options are available to recall an order:

Method 1: F1, Recall

If you know the Sales Order number, use F1, Recall. Enter the order number, press enter, and the order is displayed on your screen. You can also recall orders via the PO number by typing in "PO" followed by the relevant PO Number. To review special orders, type in "SO", a list of special orders will display.

Method 2: F2, Search

Same as you would start a new order, you would Search for the customer account associated with the order you are attempting to recall. When the account is found, the system will prompt:

"Customer has # orders on file. See them? (Y,N):

Select Y for Yes and the system provides a list of any open orders on file for that customer for the user to select from.

Method 3: F3, Open Order

You can use F3 and run an order search using an operator number to display all open orders created by that operator. Select an order for recall from the results.

Order Status

When recalling orders, you will see the status of the order:

- **'CR Hold'**: Credit hold due to overdue accounts, reaching credit limits, or maximum invoice amount allowed.
- **'BO'**: Backorder, inventory allocated for parts on back order.
- **'Quote'**: Quotation status, no inventory allocation.
- **'Open'**: Order is open, inventory allocated for that order.
- **'Invoiced'**: Order is completed, inventory reduced, and sales usage updated.

Recall Options

When you recall an order, a list of later options will display at the bottom of the parts entry screen.

Upon recalling the order, these options will appear at the bottom of the screen:

A Add more parts to the order. (If the order status is Invoiced, this option is not available.)

C Add comments to order. They will print on the invoice.

N Add Notes. These are internal notes that will not print.

T Totals page so that you could add taxes and freight.

Y This will allow you to see the Year, Make, Model information if available.

E Places the order back on hold and returns the user to the Look Up screen.

Note: Option Y is available if the Vehicle Service Shop Repair module is installed.

Order Completion

Tasks:

Totaling: Sales Tax Calculation, Charges, Fees, and Discounts

Shipping

Invoicing

Credit Card Processing

Printouts

Calculating Sales Tax

Upon the initial display of the Totals Screen, the following prompt will appear at the bottom:

Is this order a (C)ounter pickup or a (D)elivery?

Note: If the customer is designated as tax-exempt, this prompt will be omitted.

07/02/19		407-695-7300		Order No: w1*400399		PICK TICKET	
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Bill To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA			
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:		
Total Parts/Labor.: 15.60 T				ORDER SUMMARY			
1. Order Discount....: 0.00%				Shipped: 0.00 15.60			
2. Sales Tax.....: 0.00				B/o'd...: 0.00 0.00			
3. Outgoing Freight...: 0.00				Total...: 0.00 15.60			
4. Incoming Freight...: 0.00				Other Fees			
Other Fees.....: 0.00				Shop Supplies...: 0.00			
5. Federal Excise Tax: 0.00				Env Fees.....: 0.00			
6. GL#.: 0.00				TOTAL ORDER:			
Is this order a (C)ounter pickup or a (D)elivery?: D							

- (C)ounter pickup implies the customer will collect the purchased parts in-store.
- (D)elivery indicates that the parts will be delivered, either through a carrier service or your delivery driver.

A response to this prompt is mandatory as it sets the sales tax territory for calculating the sales tax on this order.

Add More Parts to Order

Once the sales tax question is addressed, the prompt at the bottom of the screen changes to:

Enter Option Number, (A)dd parts

07/02/19		407-695-7300		Order No: w1*400399		PICK TICKET																						
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Bill To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA																								
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:																							
Total Parts/Labor.: 15.60 T 1. Order Discount....: 0.00% 0.00 2. Sales Tax.....: 0.00 3. Outgoing Freight...: 0.00 4. Incoming Freight...: 0.00 Other Fees.....: 0.00 5. Federal Excise Tax: 0.00 6. GL#.: 0.00 TOTAL ORDER: 15.60				ORDER SUMMARY <table border="1"> <thead> <tr> <th></th> <th>Weight</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Shipped:</td> <td>0.00</td> <td>15.60</td> </tr> <tr> <td>B/O'd...:</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Total...:</td> <td>0.00</td> <td>15.60</td> </tr> <tr> <td colspan="3">Other Fees</td> </tr> <tr> <td>Shop Supplies...:</td> <td></td> <td>0.00</td> </tr> <tr> <td>Env Fees.....:</td> <td></td> <td>0.00</td> </tr> </tbody> </table>					Weight	Amount	Shipped:	0.00	15.60	B/O'd...:	0.00	0.00	Total...:	0.00	15.60	Other Fees			Shop Supplies...:		0.00	Env Fees.....:		0.00
	Weight	Amount																										
Shipped:	0.00	15.60																										
B/O'd...:	0.00	0.00																										
Total...:	0.00	15.60																										
Other Fees																												
Shop Supplies...:		0.00																										
Env Fees.....:		0.00																										
Enter Option Number, (A)dd parts:																												

To add more parts, enter 'A' and return to Parts Entry. For modifications to individual line-item totals, enter the corresponding line number and press ENTER.

Making Changes to the Totals Breakdown

To access any line on this screen, enter the line number and press ENTER.

Note: Some fields may require authorized user access and a password, or may be blocked from user access entirely.

Total Parts/Labor..:		22.56	T
1. Order Discount....:	0.00%	0.00	
2. Sales Tax.....:	7.250%	1.64	
3. Outgoing Freight..:		0.00	
4. Incoming Freight..:		0.00	
Other Fees.....:		0.00	
5. Federal Excise Tax:		0.00	
6. GL#.::		0.00	
7. Fuel Surcharge....:			
8. Convenience Fee...:	N		
TOTAL ORDER:		24.20	

- **Order Discount** – A discount percentage or discount amount can be entered. This discount will be applied to the Total Parts amount.
- **Sales Tax** – The sales tax percentage will appear and the sales tax amount to be charged on this order.
- **Outgoing Freight** – The shipping freight to deliver these parts to your customer.
- **Incoming Freight** – The shipping freight that was charged to get the parts delivered to your store.
- **Federal Excise Tax** – Enter the FET to be charge on this order.
- **GL#** - If the parts sales is to be posted to a GL account other than to the default GL account, enter the alternate GL account number here. Often this field is blocked from User Access.
- **Fuel Surcharge** – If your system is flagged to charge a fuel surcharge, the defined surcharge fee will appear on this line. To remove a surcharge amount will require access and a password.
- **Convenience Fee** – If your system is flagged to charge credit card service fee, the fee to be charged will appear here. To remove a convenience fee will require access and a password.
- **Total Order** – Final invoice amount.

Order Discount

Input a discount, which can be specified either as a percentage or a specific monetary amount. This discount, once entered, is designed to be applied to the overall Total Parts amount, resulting in a reduction proportional to the specified discount percentage or amount.

07/02/19		407-695-7300		Order No: w1*400399		PICK TICKET			
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Bill To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA					
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0		PO:			
Total Parts/Labor.: 15.60 T				ORDER SUMMARY					
1. Order Discount.... 0.00%				Weight				Amount	
2. Sales Tax..... 7.250%				Shipped: 0.00				15.60	
3. Outgoing Freight... 0.00				B/o'd... 0.00				0.00	
4. Incoming Freight... 0.00				Total... 0.00				15.60	
5. Federal Excise Tax: 0.00				Other Fees					
6. GL#.: 0.00				Shop Supplies..:				0.00	
TOTAL ORDER: 16.73				Env Fees.....:				0.00	
Enter option Number, (A)dd parts: █									

Sales Tax

The sales tax percentage will appear and the sales tax amount to be charged on this order. The Sales Taxes are calculated based upon the customer's tax territory, defined by their Customer Master Record. If the customer is Sales Tax exempt, the word "EXEMPT" will be displayed in a reverse display.

Outgoing/Incoming Freight

If the customer is to be charged freight, type in option 3 or 4, then key the freight amount and press ENTER. This helps separate the shipping costs for sending and receiving goods.

Note: The available fields may vary due to system settings, modules, or user preferences. Fields for Shop Supplies, Env Fee, HazMat Deposits, HazMat Returns are populated thru the Vehicle Shop Module.

Order Summary

The Order Summary will show the total weight shipped and back-ordered. **This will only appear if there has been weight added to the parts in Inventory File Maintenance.** The total dollar amount will display for what has been shipped and what was back-ordered.

When ready, press ENTER to proceed to the Options Screen to apply any final additional options to the order or to complete the order.

Adding Additional Order Information

On the Order Entry Options screen, we can select options to add information.

PO#

To input the Purchase Order (PO) number, navigate to the Options Field by pressing F9 and then press ENTER. The cursor focus will shift to the PO box. Enter the customer's PO number and press ENTER.

770-555-7445		Order No: W1*401842		OPEN ORDER	
SUNSHINE GRADING 8755 S THOMAS DR ROSWELL, GA 30075 FULTON			Bill To: SUNSHINE GRADING 8755 S THOMAS DR 619000A ROSWELL, GA 30075 FULTON		
-NET 30 DAYS	TAXABLE	B/O OK	Ctr:0	PO: █.....	
sman.: 999 - JD0E			E	Option: F9	
Via.: 01 - CUST PICK-UP					

Automatic PO Entry: If the customer is configured in the A/R Customer File Maintenance as PO Required, the cursor will automatically move to the PO box when you select 'Y' to invoice. In such cases, ensure the PO# is entered before proceeding with invoicing.

Attn:

Press F10 to direct the cursor focus to the Attn: box. Enter the recipient's name for delivery, and this information will be printed on the invoice and packing slip.

1. Salesman.: 999 - JD0E		E	Option: F10	
2. Ship Via.: 01 - CUST PICK-UP				
3. Spcl Inst:				
4. Check Nbr:				
Drv. Licn:		\$95.41		
Phone Nbr:				
5. Release #:				
Attn: █		Truck No.		
		Y = Invoice K = Ack'men P = Pick Ticket G = Get App A = Add Parts V = View No H = Hold TN= PkgTrac T = Totals N = Signatu Q = Quotation D = Del'Dr X = Cancel Order B = Backorder I = Issue PO		
F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=PO# F10=Attn F11=Trk#				

Truck No.

Press F11 to direct the cursor focus to the Truck NO. box. If you utilize Truck numbers for deliveries, input the relevant information in the Truck No. field.

Alternatively, if you prefer to use Route numbers for deliveries, you can also input that information in this free-form field.

1. Salesman.: 999 - JDOE		E	Option: -
2. Ship Via.: 01 - CUST PICK-UP			
3. Spcl Inst:			
4. Check Nbr:			Y = Invoice
Drv. Licn:	\$95.41		P = Pick Ticket
Phone Nbr:			A = Add Parts
5. Release #:			H = Hold
			T = Totals
			Q = Quotation
			X = Cancel Order
			B = Backorder
			I = Issue PO
			K = Ack'ment
			G = Get Apprvl
			V = View Notes
			TN= PkgTrack#
			N = Signature
			D = Del'Driver
Attn:	Truck No.		
	█.....		
F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=P0# F10=Attn F11=Trk#			

Salesman

Displays the customer's assigned salesman.

08/07/23		770-555-7445		Order No: W13
Ship To: SUNSHINE GRADING			Bill To	
8755 S THOMAS DR				
619000 ROSWELL, GA 30075 FULTON			619000A	
Terms: A-NET 30 DAYS	TAXABLE	B/O OK	Ctr:0	
1. Salesman.: 999 - JDOE E				
2. Ship Via.: 01 - CUST PICK-UP				
3. Spcl Inst:				
4. Check Nbr:				
Drv. Licn:			\$95.41	
Phone Nbr:				
5. Release #:				

Ship Via Codes

How the parts will be delivered to the customer. Entering a ? will display the list of defined ship via codes that can be selected.

08/07/23		770-555-7445		Order No: W1	
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON				Bill To 619000A	
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0	
1. Salesman.: 999 - JDOE E 2. Ship Via.: 01 - CUST PICK-UP 3. Spcl Inst: 4. Check Nbr: Drv. Licn: \$95.41 Phone Nbr: 5. Release #:					

Special Instructions

You have two lines of special instructions that can be entered and will print on the invoice.

08/07/23		770-555-7445		Order No: W1*40	
Ship To: SUNSHINE GRADING 8755 S THOMAS DR 619000 ROSWELL, GA 30075 FULTON				Bill To: SU 87 619000A RO	
Terms: A-NET 30 DAYS		TAXABLE	B/O OK	Ctr:0	
1. Salesman.: 999 - JDOE E Op 2. Ship Via.: 01 - CUST PICK-UP 3. Spcl Inst: SPECIAL INSTRUCTIONS TYPED Y = HERE WILL PRINT ON INVOICE P = 4. Check Nbr: A = Drv. Licn: \$95.41 H = Phone Nbr: T = 5. Release #: Q = Attn: X = B = Truck No. I =					
F5=Payment F6=ShipTo F7=BillTo F8=Terms F9=P0# F10					

Check Number, Driving License, Phone Number

If the payment terms involve a check payment, enter the check number and other needed information. Enter the associated line item number to enter check payment information.

If the payment term is a credit card term, the fields will change. Refer to credit card processing section of this guide for more details.

Release #

If there is a blanket purchase order (PO) for the customer, enter the release number if applicable.

Changing Accounts and Shipping Address:

Ship To Accounts VS Bill To Accounts

- **Bill To:** Remains the same for all orders for the customer. This is where the invoice will be sent.
- **Ship to:** Can be changed based on where the order needs to be delivered.
 - The Ship-To address field will only allow you to change the address.
 - You cannot change the Ship-To account number.
 - You can apply a new drop ship name and address to an order.

Example of a Bill To and Ship To Setup

Customer #2010 is AutoPower Truck Parts, which has six additional locations. However, the financial transactions are managed from a single location. This would be the set up this customer in the Customer A/R system:

- Set up a customer number, 2010 (Bill-To Customer),
- Using sequential numbering for Ship-To account numbers (dash-1, dash-2, etc.) Set up Ship-To customers 2010-1, 2010-2, 2010-3, 2010-4, 2010-5, and 2010-6 to associate to the Bill-to Customer.

Skipping numbers disrupts the system's ability to recognize Ship-To accounts.

Change Shipping Address on a Sales Order (a.k.a. Adding a Drop Ship address)

To change the Ship-To address, press F7.

- Input drop ship information in the window that displays and click OK.
- To clear entered drop ship information, click the Clear button.

The screenshot displays a software interface for order entry. At the top, it shows the date '07/02/19', phone number '407-695-7300', and 'Order No: W1*400399'. The main area is divided into sections for 'Ship To' and 'Bill To', both pointing to 'BOB JONES PARTS CENTER' at '9845 MAINTENANCE STREET, 1002 LAKE MARY, FL 32746 USA'. Below this, there are fields for 'Terms: G-CASH', 'TAXABLE', 'B/O OK', and 'Ctr: 0'. A list of instructions follows: '1. Salesman.: 0 - AUTOPOWER', '2. Ship Via.: 01 - CUST PICK-UP', '3. Spcl Inst: SPECIAL INSTRUCTIONS TYPED HERE WILL PRINT ON INVOICE', '4. Check Nbr: \$16.73', and '5. Release #:'. At the bottom, there are 'Attn:' and 'Truck No.' fields. Overlaid on the right is a 'Ship To' dialog box with the following fields: 'Name: BOB JONES PARTS CENTER', 'Address1: 9845 MAINTENANCE STREET', 'Address2:', 'City: LAKE MARY', 'State: FL', 'Zip: 32746', 'Country: USA', 'Phone: 407-695-7300', and 'Attention:'. The dialog box has 'Clear', 'OK', and 'Cancel' buttons at the bottom.

After Changing

- Upon changing the address, you will be redirected to the Totals screen and prompted to specify whether the order is for Counter Pickup or Delivery.
- This question helps determine the applicable tax code for the order.
- If the account is tax-exempt, this question will not be asked.

Changing The Ship To: Account

On the Order Entry Options screen, to change just the Ship-To account number...

- Enter option F7 and re-key the same Bill-To account number (a.k.a. the customer account number).
- At the bottom of the screen when prompted, enter the new Ship-To account number or select it from a list of Ship-To accounts by entering **S** at this prompt.

After Changing

- Upon changing the address, you will be redirected to the Totals screen and prompted to specify whether the order is for Counter Pickup or Delivery.
 - This question helps determine the applicable tax code for the order.
 - If the Ship-To account is tax-exempt, this question will not be asked.

Changing The Bill To: Account

On the Order Entry Options screen, to select a new Bill-To customer account for a sales order...

- Enter option F7 and key the customer account or search for the account and select it from the search results.
 - After the Bill-To customer is changed, if there are associated Ship-To accounts...
 - Enter the new Ship-To account number or enter S to display a list of Ship-To accounts to select from.
 - You will not be prompted for a Ship To entry if there are no associated Ship To accounts.

After Changing

- When a different customer account (Bill To) is selected for a sales order, the pricing and sales tax will be recalculated.
- You will be redirected to the Totals screen and prompted to specify whether the order is for Counter Pickup or Delivery.
 - This question helps determine the applicable tax code for the order.
 - If the account is tax-exempt, this question will not be asked.

Payment and Invoicing

Payment Terms

The payment method, referred to as "Payment Terms" or simply "Terms," dictates the settlement of the invoice amount. These terms are predefined payment methods and plans within the system. To modify the payment terms, follow these steps:

1. Use the F8 key to select the payment terms field for modifications.
2. A list of Payment Terms will be displayed. Select the Terms you wish to apply.

The screenshot shows a software interface for entering shipping and billing information. At the top, it displays the date 07/02/19, phone number 407-339-1657, Order No: W1*400399, and PICK TICKET. The 'Ship To' address is AUTOPOWER TRUCK PARTS, 2570 RONALD REAGAN DR, 2010-2 LONGWOOD, FL 32750 USA. The 'Bill To' address is AUTOPOWER TRUCK PARTS, 575 TECH LANE. The 'Terms' field is set to F1CASH, with TAXABLE and B/V checkboxes. A list of terms is shown: 1. Salesman.: 0 - AUTOPOWER, 2. Ship Via.: 01 - CUST PICK-UP, 3. Spcl Inst: SPECIAL INSTRUCTION HERE WILL PRINT ON, 4. Check Nbr:, Drv. Licn:, Phone Nbr:, 5. Release #:. An 'Attn:' field is also present. An 'A/R Payment Terms' dialog box is open, listing various payment terms: 1%-1ST1% DISCOUNT BY 1ST NET 10TH (highlighted), A NET 30 DAYS, AX AMERICAN EXPRESS, B C.O.D., C CHECK, CL CC NOT XC, DI DISCOVER, FC FINANCE CHARGE, G CASH, GC GIFT CARD REDEMPTION, MC MASTER CARD, N NET 10TH, SS STOP SHIP. The dialog has OK and Cancel buttons. At the bottom of the form, function key shortcuts are listed: F5=Payment, F6=ShipTo, F7=BillTo, F8=Terms, F9=PO#, F10=Attn, F11=Trk#.

If the Terms Code is set as "G -Cash Pay Terms," it cannot be changed to "Charge On Account Pay Terms." However, you have the flexibility to switch to other types of payment methods such as credit cards or checks.

Invoicing

When ready to issue the invoice for the order, in the "Option" field simply type "Y" and press ENTER to select the "Invoice" option.

Upon selecting the option to invoice, the system initiates several processes:

- Conducts a customer credit check.
- Validates the payment terms.
- Verifies if a purchase order number is required.

The system prompts for payment entry if the terms selected requires payment to be made at the time of invoicing. (i.e., Cash, Check, Credit Card, etc.....)

If the order's payment terms are set to credit card and credit card processing module is installed on your AutoPower system, the user will be prompted to swipe or enter the customer's credit card information.

If the payment validates and any required **POs** are entered, the system then displays the printer selection window, defaulting to the branch's invoice printer associated with the order. If an alternative printer is necessary, you can select it from the printer list for the printout.

Subsequently, the system generates the invoice number, proceeds to print the invoice and pick tickets, and seamlessly returns to the Order Entry "Look Up" screen, ready for initiating another order.

Credit Card Processing

To initiate a credit card transaction, follow the process outlined below:

Create an Order

- Set the payment terms of the order to credit card terms. (e.g., Visa, MasterCard, etc.)
- Once the order is created with the specified payment terms, proceed to invoice the order.

Access Credit Card Processing

- To access credit card processing features, enter your password when prompted.
 - In case you forget your password, contact AutoPower support to reset your user password.
- After entering the password, select “OK” to display the Credit Card Payment screen.

Select Entry Method

Choose the desired entry method for a credit card:

- **Swipe credit card:**
With this option select, use the card reader Swipe/Tap/EMV

The screenshot shows a 'Credit Card Payment' dialog box with the following details:

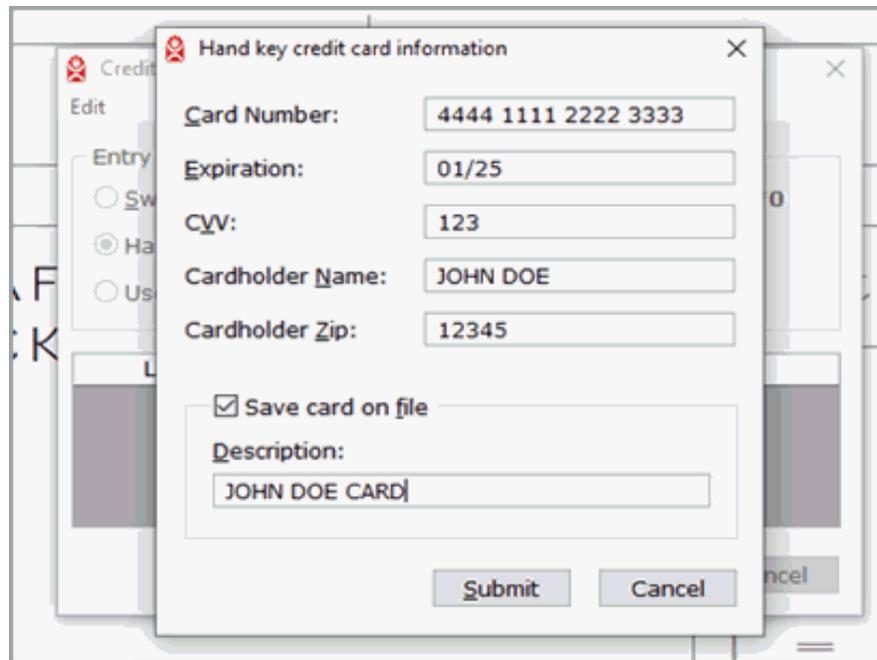
Entry Method		Transaction	
<input checked="" type="radio"/> Swipe credit card		Reference: W1*365440*0	
<input type="radio"/> Hand key credit card		Action: SALE	
<input type="radio"/> Use credit card on file		Amount: 13.94	

Last 4	Description
4111	JOHN DOE'S CARD

Buttons: Continue, Cancel

- **Hand key credit card:**

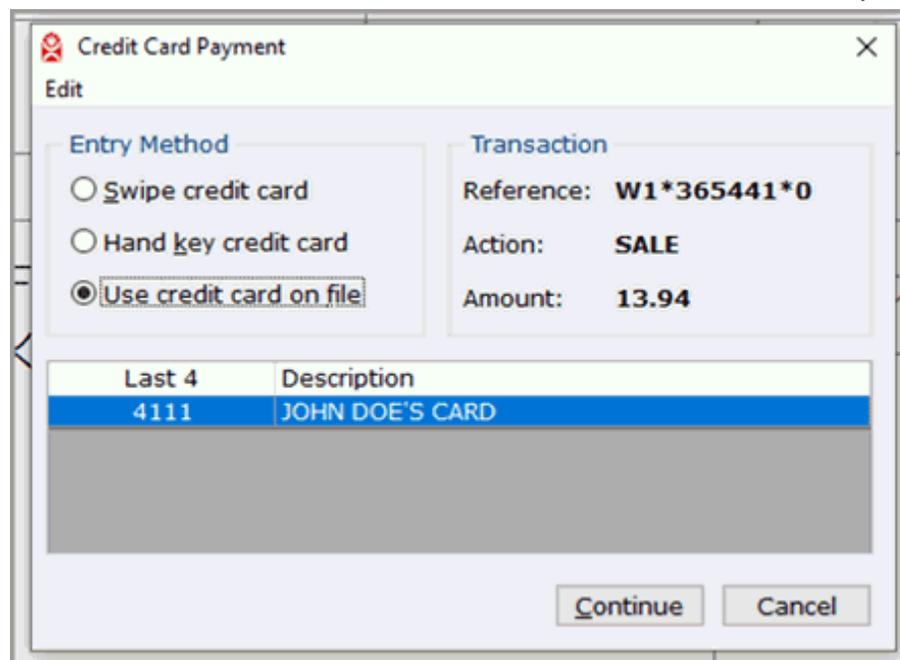
With this option selected, hand key in the card information. To save the card to the customer's account, Check "Save card on file" and input a card description.



A dialog box titled "Hand key credit card information" with a close button (X) in the top right corner. It contains several input fields: "Card Number" (4444 1111 2222 3333), "Expiration" (01/25), "CVV" (123), "Cardholder Name" (JOHN DOE), and "Cardholder Zip" (12345). Below these is a checked checkbox labeled "Save card on file" and a "Description" field containing "JOHN DOE CARD". At the bottom are "Submit" and "Cancel" buttons.

- **Save Card on File:**

Select "Use Credit Card On file" and choose the card for the transaction. If a card is saved on file, it will be listed with the last four card numbers and description.



A dialog box titled "Credit Card Payment" with an "Edit" button and a close button (X) in the top right corner. It is divided into two sections: "Entry Method" and "Transaction".

Entry Method: Three radio buttons are present: "Swipe credit card", "Hand key credit card", and "Use credit card on file" (which is selected).

Transaction: Three fields are shown: "Reference: W1*365441*0", "Action: SALE", and "Amount: 13.94".

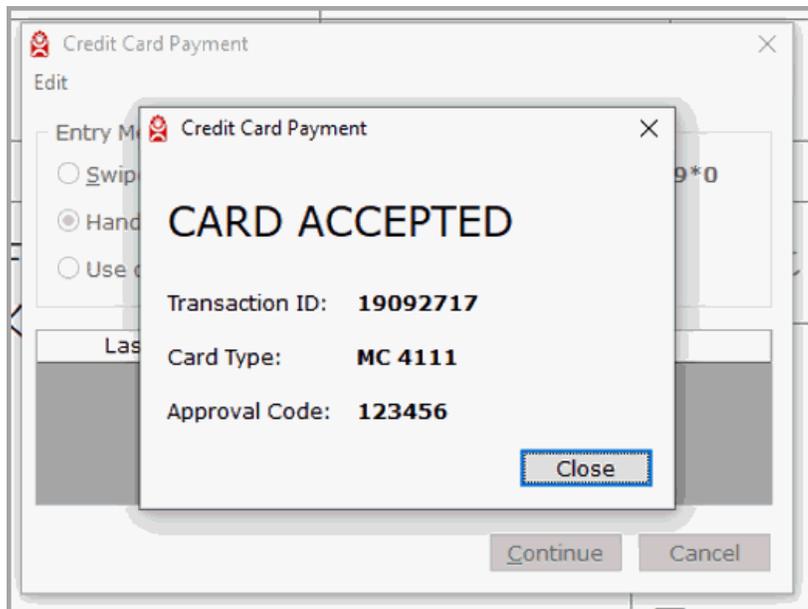
Below these sections is a table with two columns: "Last 4" and "Description".

Last 4	Description
4111	JOHN DOE'S CARD

At the bottom of the dialog are "Continue" and "Cancel" buttons.

Transaction Approval

- Upon successful completion of the credit card transaction, an approval window will display.
- Select the “Close” button to close the approval window and Credit Card Payment screen, allowing you to proceed with printing an invoice



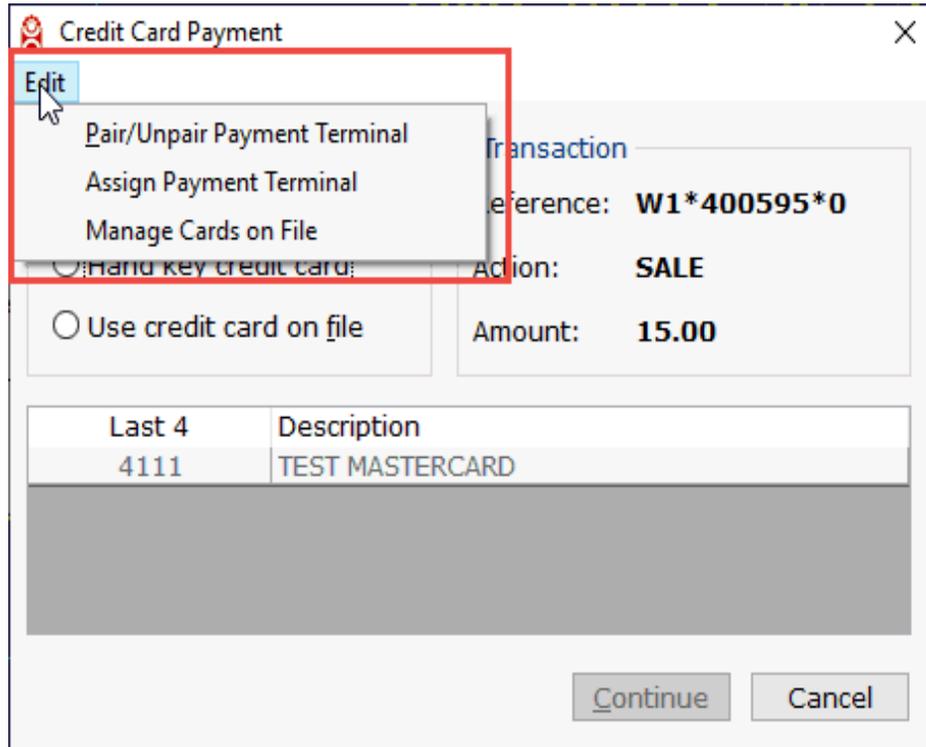
If the terminal is not correctly paired with the PC or if no terminal is assigned to the workstation, the "Swipe credit card" option will be grayed out. Refer to the Troubleshooting section below for possible solutions.

If there are no saved credit cards on the customer's account, the "Used credit card on file" option will be unavailable. To create a credit card on file, use the "Hand Key credit card" option.

Swipe/Tap/EMV transactions will NOT save a credit card on file.

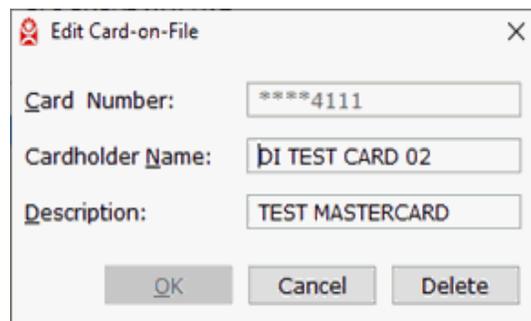
Manage Credit Cards on File

- To edit a credit card on file, select the Edit menu on the upper left of the Credit Card Payment screen.
- Choose the "Manage Cards on File" option to access the Manage Cards on File screen.



Edit Card on File

- Select the card from the table and click "Edit" to open the Edit Card on File window.
- Edit the Cardholder name and description as needed. Click "OK" to save changes.

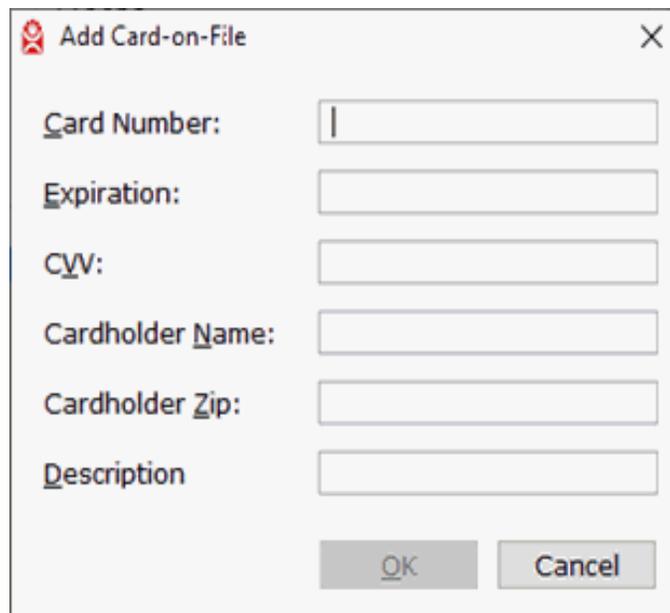


Delete Card on File

- Select the card from the table and click “Edit” to open the Edit Card on File window.
- Click the “Delete” button to remove the card from the customer’s file.

Add Card on File

- On the Manage Cards on File screen, click “Add” to access the Add Card on File screen.



The image shows a dialog box titled "Add Card-on-File" with a close button (X) in the top right corner. The dialog contains the following fields and labels:

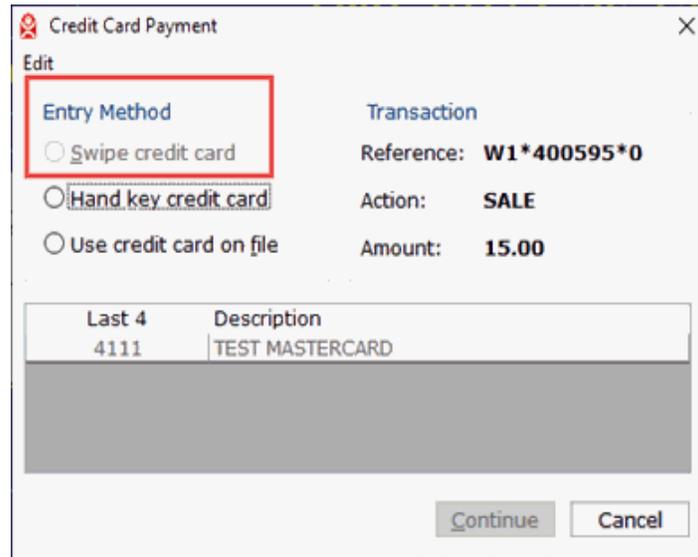
- Card Number: [input field]
- Expiration: [input field]
- CVV: [input field]
- Cardholder Name: [input field]
- Cardholder Zip: [input field]
- Description: [input field]

At the bottom of the dialog are two buttons: "OK" and "Cancel".

- Fill out all fields with the credit card information and a recognizable description.
- Click “Ok” to save the credit card to the customer’s file.

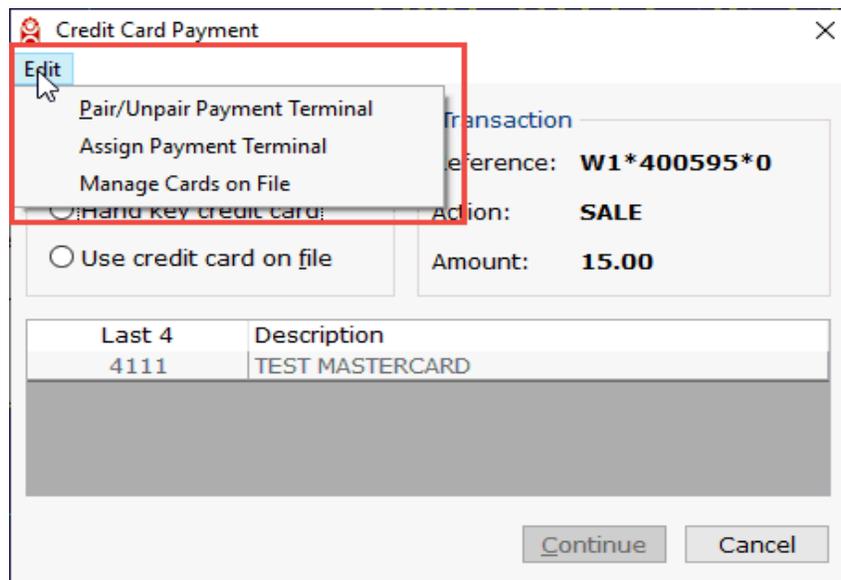
Credit Card Troubleshooting

If the "Swipe Card" option is grayed out, it indicates that the terminal is not correctly paired with the PC or there is no terminal assigned to the workstation. Follow the steps below to troubleshoot.



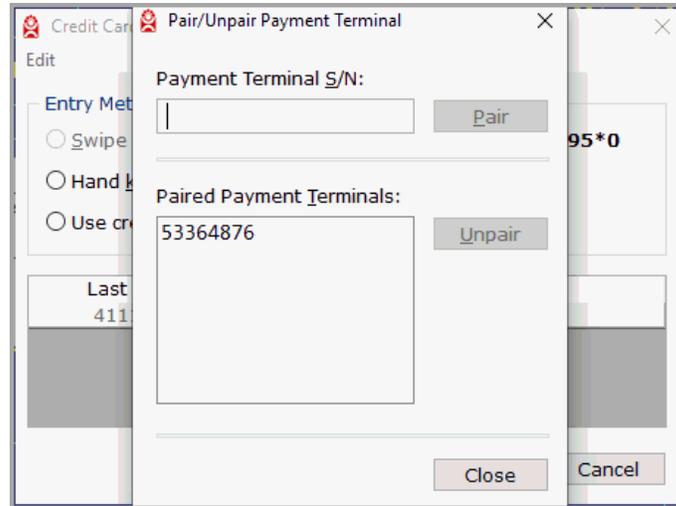
1. Access Edit Menu:

Select the Edit menu on the upper left of the Credit Card Payment screen.



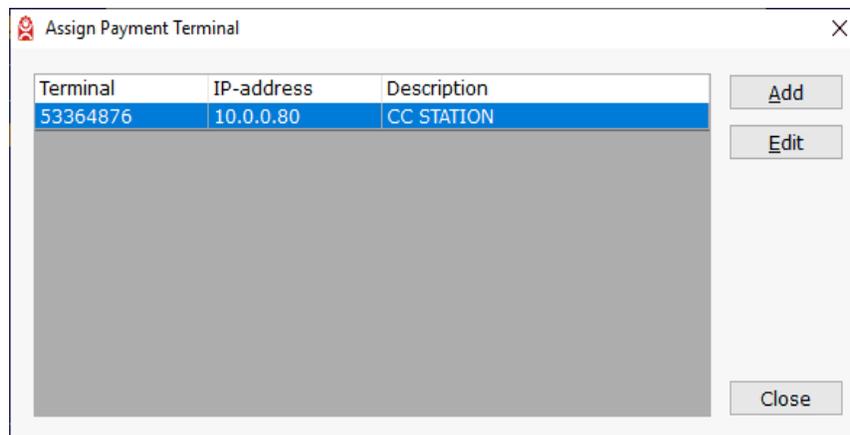
2. Pair/Unpair Payment Terminal

- Choose the “Pair/Unpair Payment Terminal” option to open the Pair/Unpair Payment Terminal screen.
- This screen can also be accessed via the 360 Payments Setup MENU.
- Check the serial number of the terminal and ensure it is paired. If not, pair it now.



3. Assign Payment Terminal

- Select the “Assign Payment Terminal” option to open the Assign Payment Terminal screen.
- This screen is also found via the 360 Payments Setup MENU.
- Use this screen to assign terminals or correct any terminal assignments.



Post-Invoicing

- Invoiced sales orders are available for recall to complete changes to items on the Totals screen (e.g., freight and sales tax) or the Options screen (e.g., payment terms, special instructions, ShipTo address).
- Invoiced orders can only be recalled Same Day; After the end-of-day processing the invoice is no longer available for recall in Order Entry.

The follow changes cannot be made once a sales order has been invoiced:

- Parts cannot be added.
- Order quantities cannot be changed.
- Part Pricing cannot be changed.
- Sales Options cannot be applied or changed.
- The customer BillTo account cannot be changed.

Order Related Printouts

There are various print options associated with orders accessible through the Order Entry Options Screen and other programs within the system.

Invoice

- On the Order Entry Options Screen, selecting option 'Y' to invoice issues the invoice.
 - The system generates the invoice number, and proceeds to print the invoice to the selected printer.
 - Pick Tickets and Packing Slips are also printed.

Reprint Invoice from History

For duplicating invoices from customer history or providing additional copies, utilize the Reprint Invoice from History program, found on the in the Order Entry Menu.

1. On the Order Entry Menu, select the Reprint Invoice from History program.
2. Enter the branch location number.
3. Specify the invoice number for reprinting.
4. Choose an option: Fax, Email, Print, or View.

Invoices from the same day cannot be reprinted using this method; for same-day reprints, recall the order and choose option 'Y' on the Options screen.

Pick Ticket

- On the Order Entry Options Screen, selecting option 'P' prints the order as a Pick Ticket.
 - Pick tickets can be printed prior to invoicing.
 - Parts can be added to the order, and all other options available to a new order are accessible.
 - If parts are added to the order prior to invoicing and a previous ticket was already printed, when you select to print the Pick Ticket, you will be prompted to choose whether to print with only the newly added parts or all parts on the order.
 - Pick Tickets also print when the order is invoiced.

Packing List

- On the Order Entry Options Screen, selecting option 'S' prints a Packing List for this order.
- When selecting this option, you will be prompted to specify the number of Packing Slips to print.
 - A packing list cannot be printed prior to invoicing. The option 'S' will not display until the order is invoiced.
 - A packing list is also printed when the order is invoiced.

A Packing List cannot be printed for a credit memo.

Quote

- On the Order Entry Options Screen, selecting option 'Q' prints Quote` for this order.
 - Quotes do not affect inventory quantities, which is not the same for Invoices, Pick Tickets, Packing List, and orders placed on hold.

Core Processing

Selling a Part with a Core

- **Input Part Number:** Type in the Part Number (e.g., DEF56789) and press ENTER. In this example, observe that the part has a core with a value of \$15.00, and the core price automatically populates the Core Column.
- **Input Order Quantity:** Enter the order quantity of the part with no additional options. The line item total in the Extension Column is computed by adding the core price to the part price, then multiplying the result by the quantity shipped.

06/27/19		407-695-7300		Order No: w1*400380					
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Ship Total.: 36.33 Order Total: 36.33 GM%.....: 54.14%					
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 1234	P		1	1	0	0.00	16.50	16.50
2	BSR 4707QF520			1	1	0	15.00	19.83	34.83
3	█								
f1=HoldOrd f2=Refresh f3=List% f4=Comment f5=Note f6=VehSvc						f7=ShowOpt f8=UnitSrch f9=NoteCard f12=Contcs			

- **Proceed with processing and completing the order:** Once the quantity and pricing details are entered, proceed with processing and completing the order.

Core Exchanges

- **Input Part Number:** Type in the Part Number (e.g., BSR2086D) and press ENTER.

06/27/19		407-695-7300		Order No: w1*400380					
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				No Prior Purchase History					
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 1234	P		1	1	0	0.00	16.50	16.50
2	BSR 4707QF520			1	1	0	15.00	19.83	34.83
3	BSR 2086D			1 1E			20.00	29.18	

PARKING BRAKE SHOE - EXCHANGE... L=29.18 GM=62.51%
 Core Part: COR2086D Qty Banked: 0 Eligible for Return: 0

- **Set Quantity for Core Exchange:** For the ORD quantity, type in (1E) and press ENTER. In this example, this indicates selling a quantity of 1 of part BSR2086D without charging the customer the core price, creating a core exchange.

06/27/19		407-695-7300		Order No: w1*400380					
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Ship Total.: 65.51 Order Total: 65.51 GM%.....: 57.87%					
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0	PO:				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension
1	ABC 1234	P		1	1	0	0.00	16.50	16.50
2	BSR 4707QF520			1	1	0	15.00	19.83	34.83
3	BSR 2086D	E		1	1	0		29.18	29.18
4									

f1=HoldOrd f2=Refresh f3=List% f4=Comment f5=Note f6=VehSvc
 f7=ShowOpt f8=UnitSrch f9=NoteCard f12=Contcs

Observe that in the screenshot, there is no core value displayed.

Core Return

Start a Core Return

- Input Part Number and press ENTER. By inputting a part with a core, the system displays the customer eligibility to make a core return at the bottom of the screen.
- Input the quantity of used cores (indicated by entering the quantity as a negative) followed by the C option (e.g. , -1C). The C option ensures only the core price is refunded without affecting the part price.

Based on the customer's eligibility to return, you will proceed one of two ways:

Applying Core Return (with eligibility)

- Follow the process to start a core return.
- A list of the invoices that contain the entered part will be displayed, showing with purchased and returned quantities along with the refund balance. Also, how many cores are available for refund and if the customer has any banked cores.
- Navigate and proceed using the options listed at the prompt at the bottom of the screen:
 - **Accept? (Y,N,E,F,B,D,A,K,C,#,?):**
 - Y = Accept data as is.
 - N = Do not accept data. Re-display to original values.
 - E = Exit. Do not save any changes.
 - F = Page Forward.
 - B = Page Backward.
 - D = Display the detail of the transaction.
 - A = Auto apply credit against the oldest purchases.
 - K = Apply to Bank and give no credit.
 - C = Give Credit and do not affect Corebank
 - # = Line number to apply credit against.
- At the prompt **Accept? (Y,N,E,F,B,D,A,K,C,#,?)** , Enter the invoice line item number of the invoice to apply the core return towards. Press ENTER.

- Enter the quantity to apply, Ensuring the returned quantity doesn't exceed Refund Balance. The full refund of the core price will be applied
 - If needed, adjust refund amount (i.e., for damaged core return) by entering quantity followed by P (e.g. , 1P). Proceed to the line where you can enter the adjusted core refund amount press ENTER at the options line.
- When prompted **Accept? (Y,N,E,F,B,D,A,K,C,#,?)**; Confirm with Y and press ENTER.

Applying Core Return (Without Eligibility)

Follow the process to start a core return.

- If ineligible, choose from prompted options (A, C, R).
 - A = no credit - add to corebank Choosing option A for no credit means that the system will automatically add the core return to the customer Corebank and not issue credit to the invoice.
 - Option A is the one most often used.
 - C = issue credit - do not affect corebank Choosing the C option will automatically credit the core to the customers invoice and will not affect the customers corebank.
 - R = issue credit - reduce corebank Choosing the R option the system will issue a credit to the invoice and will reduce the customers corebank.
- Select an option and press ENTER.

Finalize Core Return

- The dirty core goes into the inventory based on the chosen option.
- Customer's Corebank is affected based on if credit and reduction are selected.

Customer Core Bank Inquiry

Efficient Core control prevents revenue loss. To check a customer's core return eligibility, select the Customer Core Bank Inquiry program on the Order Entry menu.

To inquire about a customer's core bank records:

- Enter the customer number.
- Specify a part number, core class, or input "ALL" to view all transactions.

The system displays details, including the following:

- Location
- Invoice Number
- Part Number/Core Class
- Invoice Date
- Purchased Quantity and Price
- Returns Quantity and Price
- Core Balance
- Banked Balance (e.g., if a customer has 2 cores to return but only needs 1 presently, they can bank the other for a future purchase).

07/09/2019		Customer Core Bank Inquiry						IN-NCBINQ		
Customer: 1002 - BOB JONES PARTS CEN Part/Core Class: ALL										
Ln	Loc	Invoice	Part Number	Date	Purchases		Refunds		Ref Bal	Bank Bal
					Qty	Extnd	Qty	Extnd		
1	w1	320947	TEK2023	06/27/19	1	22.00	1	10.00	0	
2	w1	320948	TEK2023	06/27/19	8	176.00			8	
3	w1	320949	R/SGG4515QHD	06/27/19						1
4	w1	320950	COR2086D	06/27/19	1	20.00	1	20.00	0	
5	w1	320950	COR4707	06/27/19	1	15.00			1	

Options: (F,B,E):

To navigate the inquiry details, use the prompts options at the bottom of the screen:

- F: Forward the current page
- B: Back up to the previous page
- E: Exit and return to the Customer number prompt.

Returns Processing

Part Return

This guide ensures accurate processing of part returns that will be reintegrated into inventory (i.e., returning an undamaged, non-defective part due to purchasing the wrong item).

Entering Customer Account Information:

- Begin the return process as if initiating a new order.
- Look up the customer account and enter the part number of the item being returned.

Parts Entry, Return Quantity:

- When entering the order quantity, input a minus sign (-) followed by the quantity being returned (e.g., -1).
 - The screen will display all invoices where the customer has previously purchased the specified part.

Selecting an Invoice:

- Select the line-item number of the specific invoice against which you want to process the part return.
- Press ENTER to proceed.
- The system will show the quantity shipped, part price, and calculate the extension price, displaying it as a credit amount on the order.

Completing Totals and Options:

- Provide any additional required information on the order entry totals and options pages as necessary.

Printing Credit Memo:

- After confirming all details, proceed to print the credit memo.
- The credit memo will contain a message confirming the processing of the part return against the selected invoice.

Warranty Return

This guide ensures accurate processing of warranty returns (i.e., returning a defective part).

Entering Customer Account Information:

- Begin the return process as if initiating a new order.
- Look up the customer account and enter the part number of the item being returned.

Entering Warranty Return Information:

- When entering the order quantity, enter a minus followed by the quantity being returned, followed by the W option. (e.g., -1W)

06/27/19		920-555-5922		Order No: w1*400389				
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206				Last Sale: 01/13/17 Qty.....: 1 Price....: 15.70 37.90% Invoice...: 306575				
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0	PO: REQUIRED			
ITM	Part Number	AVL	ORD	SHP	B/O	Core	Price	Extension
1	TEK 2023	11	-1w			22.00	129.99	
TEKONSHA 12 VOLT DC BATTERY... L=129.99 GM=39.88% Core Part: TEK2023 Qty Banked: 0 Eligible for Return: 0								

- The screen will display all invoices where the customer has purchased this specific part.

06/27/19		920-555-5922		Order No: w1*400389				
Ship To: HAYDEN FARM EQUIPMENT 422 N SUMPTER AVE 106260 CHARLOTTE, NC 28206			Last Sale: 01/13/17 Qty.....: 1 Price....: 15.70 37.90% Invoice...: 306575					
Terms: A-NET 30 DAYS		NOTAX	B/O OK	Ctr:0	PO: REQUIRED			
Returning Part Number: TEK 2023 Qty: -1								
Itm	Invoice-No	Inv-Date	Sell-Pr	Sell-Qty	R-Qty	R-Date	R-OrderNo	R-OpNo
w1 Invoices:								
1.	w1*306575	01/13/17	15.70	1				
2.	w1*286658	10/20/15	16.02	1				
3.	w1*275021	02/10/15	18.71	1				
4.	w1*271490	11/21/14	16.02	1				
5.	w1*230477	04/17/12	16.04	3				
6.	w1*218320	07/16/11	16.02	2				
Enter Item Number, (E)xit:								

Selecting an Invoice for Warranty Application:

- Select the line-item number of the specific invoice against which you want to apply the warranty return.
- Press ENTER to proceed.

Customer Requesting Replacement:

- If the customer requests a replacement for the part, process the sale as a normal purchase.
- The result will be a zero-amount invoice.

Backorder Processing

Child Orders for Back Ordered Parts

The AutoPower system includes a helpful feature called the "Child Order", designed to simplify the handling of customer sales orders with back ordered parts.

How it Works

- When a sales order is confirmed, and it contains at least one part with a backordered quantity, the Child Order Module automatically generates a new order specifically for the back ordered parts.
- This new order (child order) retains all the essential customer and billing information from the original (parent) order, along with details of the back ordered parts.

07/09/19		407-695-7300		Order No: w1*400413						
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746 USA				Ship Total.: 373.56 Order Total: 395.56 GM%.....: 66.38%						
Terms: G-CASH		TAXABLE	B/O OK	Ctr:0		PO:				
ITM	Part Number	OPT	AVL	ORD	SHP	B/O	Core	Price	Extension	
1	DEX 014-054-01			20	20	0	0.00	3.62	72.40	
2	DEX 008-219-04			2	2	0	0.00	150.58	301.16	
3	VEL 090080			2	0	2	0.00	11.00	0.00	
4	█									
f1=HoldOrd		f2=Refresh		f3=List%		f4=Comment		f5=Note		f6=VehSvc
f7=ShowOpt		f8=UnitSrch		f9=NoteCard		f12=Contcs				

Example Scenario

Consider an order (400413) with a part having a back ordered quantity. The customer needs the available parts shipped immediately, so an invoice is created for those parts.

Child Order Creation

- Child Order: 400413.1 is created from the parent order 400413.
- Invoice: Order 400413 was assigned invoice number 320962, and the back ordered part was added to order 400413.1.

07/09/19		Order No: w1						
Ship To: BOB JONES PARTS CENTER 9845 MAINTENANCE STREET 1002 LAKE MARY, FL 32746		Bill To:						
Terms: G-CASH		Ctr:	PO:					
Item	Loc	OrderNo	TR ST	Date	PO Number	PT	Ctr	Shipto-Customer
1.	w1	400408	DI O	07/08/19	65897		0	1002 - BOB JONES PARTS
2.	w1	400413	DI C	07/09/19			0	1002 - BOB JONES PARTS
3.	w1	400413.1	DI B	07/09/19			0	1002 - BOB JONES PARTS
Enter Item, (B)ack, or press <Enter>:								

Tracking Orders

- Customer 1002's orders show that:
 - Order 400413 is marked as completed (status: C).
 - Order 400413.1 is labeled as backordered (status: B).

Next Steps

- As the child order status is 'B,' when the backordered part is received via PO Receiving, a pick ticket is generated for order 400413.1, and the available quantity of the part is reduced.
- After this, the child order can be recalled in Order Entry and finalized. Upon finalization, a new invoice number will be assigned.

Backorder Processing Menu - Reports and More

The AutoPower AutoMaster software incorporates the Child Order Module, facilitating streamlined processing of customer sales orders with back-ordered parts. With the Child Order module, the system autonomously manages back-order processing. Upon finalizing a sales order containing at least one backordered part, a new order is generated for these parts, preserving all customer and billing details from the original (parent) order.

Let's delve into the Backorder Processing Menu, accessed via the Order Entry.

Tuesday, 07/09/19	AUTOPOWER CORPORATION	(P33)	0
CUSTOMER BACK ORDER PROCESSING MENU			
1...Customer B/O Report By Customer			
2...Customer B/O Report By Salesman			
3...Customer B/O Report By Vendor			
4...Customer B/O Report By Part Number			
5...Fill Customer B/O (Auto Fill)			
6...Display Orders Still On Hold			
Enter Selection:			

Customer Back Order Report by Customer

- Option #1 displays the Customer Back Order Report by Customer.
- Input branch location or "ALL," customer number or "ALL," and choose to print ("P") or display ("D") the report.
- The report shows location, order details, quantities, part numbers, and order status sorted by customer number.

Customer Back Order Report by Salesman

- This report can be accessed by entering branch location or "ALL" and salesman number or "ALL."
- Lists orders by location, order number, date, salesman details, quantities, vendor, part number, and purchase order number.

Customer Backorder by Vendor

- Enter branch location or "ALL" and vendor code or "ALL."
- Report includes location, order details, vendor, part number, description, quantities, and ship-to customer information, sorted by vendor.

Customer Backorder by Part Number

- Input branch location or "ALL" and vendor code(s) or "ALL."
- Report displays location, order details, vendor, part number, quantities, order date, ship-to customer, and sell price, sorted by part number.

Fill Customer Backorder (Auto Fill)

- If using the Child Order Module, manual running of Fill Customer Backorder is unnecessary.
- The Auto Fill program analyzes backordered customer orders, allocates available inventory, and prints pick tickets for order processing.
- Enter branch location, customer number (or "ALL"), and confirm if you wish to fill back orders ("Y" or "N"). The program initiates back order processing, printing pick tickets for allocated orders.

Reviewing Orders and Order History

Overview

This section provides guidance on reviewing customer orders and accessing order history within the system. You can utilize various programs on the Order Entry menu, such as View Customer Orders, Reprint Invoice from History, and Customer Parts Purchase History.

View Customer Orders

To view Open Sales Orders, Backorders, and Quotes, access the Order Entry Menu and select View Customer Orders. Choose the order types (Open Sales Orders, Backorders, Quotes, etc.) you want to review, and click the "Select Orders" button. The resulting report can be exported and printed.

Customer Orders

Branch: ALL - Branches Counter Person: All

Status: Open B/O Quotes Invoiced All Orders Type: RMA WEB WO Select Orders

Item#	Br	Order No.	Date	Time	ST	Order Total	CtrlNo	Company Name	SRC	WO	RMA	Status	Salesman
75	W1	400408	07/08/19	04:22:36PM	O	\$544.69	0	BOB JONES PARTS CENTER	O/E				0
74	W1	400405	07/05/19	03:09:44PM	O	\$11.00	0	W2	O/E			15:09:44 05 JUL 2019	COLH
125	W2	523651	07/05/19	03:08:33PM	O	\$17.60	0	MINNIE MOUSE	O/E				0
73	W1	400396	07/01/19	11:18:14AM	O	\$98.67	0	HEGEMAN TRUCKING CO.	O/E				DCL
72	W1	400390	06/28/19	09:23:19AM	O		0	SUNSHINE GRADING	O/E				GHSE
71	W1	400389	06/27/19	03:59:34PM	O	\$49.52	0	HAYDEN FARM EQUIPMENT	O/E				CIHS
67	W1	400355	06/26/19	10:15:28AM	O		0	MINNIE MOUSE	O/E			10:36:46 26 JUN 2019	0
68	W1	400361	06/26/19	10:39:57AM	O		0	MINNIE MOUSE	O/E			10:41:23 26 JUN 2019	0
69	W1	400366	06/26/19	10:55:59AM	O	\$16.00	0	SUNSHINE GRADING	O/E				GHSE
70	W1	400367	06/26/19	10:59:19AM	O	\$56.64	0	SUNSHINE GRADING	O/E				GHSE
66	W1	400351	06/25/19	09:44:35AM	O	\$409.61	0	J.P. OWENS TRUCKING	O/E				VLG
65	W1	400302	05/31/19	12:47:16PM	O		0	W2	O/E			12:47:16 31 MAY 2019	
64	W1	400271	05/30/19	10:14:50AM	O	\$182.50	0	DOUGLAS SALVAGE	O/E	Y			HSE
63	W1	400236	05/21/19	12:34:18PM	O	\$617.52	0	W2	O/E			12:34:18 21 MAY 2019	
62	W1	400212	05/10/19	11:51:06AM	O	\$289.68	0	W2	O/E			11:51:06 10 MAY 2019	
61	W1	400208	05/09/19	10:34:47AM	O	\$868.00	0	DOUGLAS SALVAGE	O/E	Y			HSE
60	W1	400164	04/22/19	05:15:36PM	O	\$5.00	0	DOUGLAS SALVAGE	O/E	Y			HSE
59	W1	400154	04/17/19	10:26:24AM	O		0	DOUGLAS SALVAGE	O/E				HSE
58	W1	400119	03/28/19	09:46:57AM	O	\$-26.25	0	DOUGLAS SALVAGE	O/E				HSE
55	W1	400079	03/18/19	09:36:36AM	O	\$984.60	0	W3	O/E			09:36:36 18 MAR 2019	
56	W1	400080	03/18/19	09:36:36AM	O	\$656.40	0	W4	O/E			09:36:36 18 MAR 2019	
57	W1	400081	03/18/19	09:36:36AM	O	\$656.40	0	W5	O/E			09:36:36 18 MAR 2019	
54	W1	400030	03/04/19	01:49:39PM	O	\$366.00	0	DOUGLAS SALVAGE	O/E	Y			HSE
53	W1	400027	03/01/19	04:57:10PM	O	\$463.05	0	DOUGLAS SALVAGE	O/E				HSE
52	W1	400006	02/15/19	01:36:36PM	O	\$4,146.84	0	W2	O/E			13:36:36 15 FEB 2019	COLH
51	W1	366521	12/04/18	11:42:32AM	O	\$320.94	0	DOUGLAS SALVAGE	O/E			14:30:42 04 FEB 2019	HSE
45	W1	366420	10/23/18	02:37:48PM	O	\$132.00	0	W3	O/E			14:37:48 23 OCT 2018	

165 Orders have been selected.

Export Print Reset Close

Reprint Invoice from History

If a customer requests another copy of their invoice, you can reprint it from the Order Entry Menu. Follow these steps:

1. Access the Reprint Invoice from Customer History option on the Order Entry Menu.
2. Specify the branch location number and input the invoice number for the reprint.
3. Choose to fax, email, print, or view the invoice.

You cannot reprint an invoice created on the same day; use the order entry option for today's orders.

Customer Parts Purchase History

07/09/2019		Customer/Part Purchase History				IN-PH	
Customer:		Br Loc: W1					
Part No.:		Invoice No: 320950					
PO No. . . .:		Order No:					
Order No	Inv No	Date	Part No	Qty	Opt	Price	Customer
W1*400380	320950	06/27/19	ABC1234	1	P	16.50	1002 BOB JONES
W1*400380	320950	06/27/19	BSR4707QF520	1		19.83	1002 BOB JONES
			core: COR4707	1		15.00	
W1*400380	320950	06/27/19	BSR2086D	1	E	29.18	1002 BOB JONES
			core: COR2086D	1			
W1*400380	320950	06/27/19	TEK2023	-1	C		1002 BOB JONES
			core: TEK2023	-1		10.00	
Comment: 1 core refunded against original invoice W1*320947 dated 06/27/19							
Core was damaged - full credit not issued!							
More info? (Y)es, (N)o, (E)mail, (F)ax, (P)rint, (V)iew, (U)PS: Y							

The Customer Parts Purchase History screen provides a detailed order history. To access it:

1. Enter the customer number and press ENTER.
2. Input specific details such as part number, purchase order number, location, or invoice number.
3. The screen displays the Order #, Invoice #, Part Number, Quantity Purchased, the option that was used in Order Entry. The Option field is beneficial because this will tell what option letter was keyed in during Order Entry.

Order Options Review

The Order Entry Options (followed by Option Letter) are as follows:

<ul style="list-style-type: none"> • B: Force Backorder • C: Core Return • D: Change Description • E: Core Exchange • F: Force Ship • G: Core Buy • L: Lost Sale • M: Line Item Message 	<ul style="list-style-type: none"> • N: No Month-To-Date Update • P: Price Change • Q: Special Order • R: Direct/Drop Ship • U: List Price • W: Warranty Return • Z: Force Backorder (Management Controls)
---	---

Example: When entering a part order quantity, inputting "1P" to change the price will appear in the OPT column.

Searching Sales History

To search for sales history based on a part number, simply enter the part number and press ENTER.

Order No	Inv No	Date	Part No	Qty Opt	Price	Customer
1.	1002	BOB JONES PARTS CENTER		0	0.00	
2.	1234	DONALD DUCK		1	0.00	
3.	118638-1	DOUGLAS SALVAGE		2	0.00	
4.	12345-1	MINNIE MOUSE		21	82.11	

Page 1 of 1 Enter Item#, (A)11, Enter-key: █

To view information regarding the sale of a part to a particular customer, enter the item number and press ENTER.

Order No	Inv No	Date	Part No	Qty	Opt	Price	Customer
w1*400379	320946	06/27/19	ABC11111	-1		23.00	1002 BOB JONES
Comment: -1 returned and applied to original invoice w1*320945							
w1*400378	320945	06/27/19	ABC11111	1		23.00	1002 BOB JONES
-1 returned later on 06/27/19 on order w1*400379 by 0							

Enter Customer#, .name search

Additional Details

- Sales are displayed with the most recent sales appearing first.
- To see information for a specific invoice, press ENTER thru the customer and part number. Then type in the location number and the invoice number. Press ENTER to navigate around on this screen.
- The "More info?" option (Y, N, E, F, P, V, U) allows for additional actions:
 - (Y)es- will display more information for this invoice
 - (N)o- will return focus to the customer field.
 - (E)mail- will email a history reprint of the invoice.
 - (F)ax - will fax a history reprint of the invoice.
 - (P)rint - will print a history reprint of the invoice.
 - (V)iew - will open a PDF Viewer so you can see the invoice.
 - (U)PS- will launch a browser connection with UPS to update status on shipment, if a UPS tracking number was added to the invoice.

- Entering option "Y" will display the Bill To, Ship-To, Date of invoice, PO that was keyed in at the time the sales order was entered, Invoice number, Terms for this invoice, Salesman, Ship Via at the time of invoicing, counterman who invoiced it, payment information and the dollar figures for the invoice as shown in the following example:

Customer Purchase History Inquiry			
Br Loc: W1		Invoice: 320946	Order: 400379
Bill To: 1002	Ship To: 1002		
BOB JONES PARTS CENTER	BOB JONES PARTS CENTER		
9845 MAINTENANCE STREET	9845 MAINTENANCE STREET		
LAKE MARY, FL 32746	LAKE MARY, FL 32746		
Date: 06/27/19	Parts:	-23.00	
Po No:	Cores:	0.00	
Invoice: 320946	Disc:		
Terms: G CASH	In-Out Freight:	0.00	
Salesman: 0 AUTOPOWER	HazMat:		
Ship Via: CUST PICK-UP	Labor:		
Counterman: 0 AUTOPOWER	Environmental Fee:		
Entry Time: 10:47:48AM	Shop Supplies Fee:		
Invoice on:	Sales Tax:		
M-M-Y: (none)	Total:	-23.00***	
Payment Info: (none)			
Sign on file: (none)			
Pkg Track Nos: (none)			
More info? (Y)es, (N)o, (E)mail, (F)ax, (P)rint, (V)iew, (U)PS: <input checked="" type="checkbox"/>			

Exiting Customer Parts Purchase History

To exit the Customer Parts Purchase History program, either press ENTER through the Customer field or type "E" at the Part No. field. Alternatively, exit by pressing ENTER through the Order No. field.

Stock Guides - Multi-branch Inventory Transfers

Creating Stock Guides in Order Entry is a method that ensures a smooth transfer of inventory between branches.

To implement Stock Guides, the first step is to establish a Customer Master Record for each branch. This setup is typically handled by the AutoPower go-live team. A crucial detail in this setup is ensuring that the customer payment terms are specified as SG (Stock Guide). Contact AutoPower Support to ensure proper setup.

Follow these simple steps to set up and complete a Stock Guide:

Initiating a Stock Guide Order:

- Navigate to Order Entry and start a new order.
- Use the branch number as the customer account number, ensuring it's different from the branch sending the inventory.

Adding Parts to the Stock Guide:

- Add parts to the order just like you would for a regular customer's sales order.
- Once all parts are added, print two copies of the Pick Ticket.

Preparing for Shipment:

- Pull the parts listed in the Stock Guide for transfer.
- Send one copy of the Pick Ticket along with the parts to the receiving branch.

Verification at Receiving Branch:

- Upon receiving the parts, someone at the receiving branch should verify the quantities against the Pick Ticket.
- If any discrepancies are found, make corrections to the Stock Guide.

Finalizing the Stock Guide:

- After confirming the quantity and parts, finalize the Stock Guide.
- It's important to note that Stock Guides do not generate invoices.