SouthWare Order Entry Live Portal
Quick Reference

Introduction

The Order Entry Live portal is designed to be a supplemental user interface for SouthWare's order entry system. In the initial released version it supports only two-step orders. It uses the same order files and data as the standard order entry program, so you can switch between interfaces to use the one most suitable for each operator or order. For example, you could use the portal to quickly create an order and enter three line items, switch to the standard entry program to enter a fourth line item that requires Extended Data or some other feature not available in the portal, then return to the portal to finish the order.

The portal simplifies the entry of orders while still providing access to the full-featured standard entry when needed. The topics below provide more details on the features available in the portal. The last topic outlines some examples of key functions that are available only via the standard order entry program.

Accessing the Order Entry Start Portal

The starting page portal for Order Entry is named wioestart and may be accessed via the "Order Entry" tab in the "Roles" section of Live Portals. You may also access "Order Entry" via the portals button.

Inquiring a Stock Item (without an order)

- **To Find by Stock #**
  On the start page you may enter a starting stock number in the "Find Stock#" field and press the related "Go" button. This will display a list of stock numbers that begin with the value you entered. You may select an item from the list to inquire more information.

- **To Find by Key Word**
  On the start page you may enter a key word in the "Keyword Search" field and press the related "Go" button. This will display a list of stock numbers that include the word(s). You may select an item from the list to inquire more information.

Accessing an Existing Order

- **To Find Via a List**
  You may display a list of existing orders from one of the two available links:
  - List of Orders for the Current Transaction Operator - click on the "List" link in the operator totals section of the start page (upper left) to display a list of all orders entered by the operator. You may click on an order in the list to access

the order for editing.

- List of All Orders - click on the “List All” link in the Access Order section of the start page to list all open orders. You may click on an order in the list to access the order for editing.

- **To Enter an Order Number**
  Enter a valid order number in the “Access Order #” field and press [Enter] or click on the “Get Order” button. This will validate the order number and display the order for editing.

- **To Access the Last Order**
  If you have already entered/edited at least one order then a “Last Order” link appears on the start page in the Access Order area (upper right). You may click on this to access the last order you were editing.

- **To Access Orders for a Specific Customer**
  You may specify a customer (see “Specifying the Customer for a New Order” below) and then click on the “Select an Existing Order” link that appears in the customer confirmation info. This will display a list of all open orders for the customer. You may click on an order in the list to access the order for editing.

Specifying the Customer for a New Order

- **To Find an Existing Customer**
  Via Customer Number
  If you know the customer number you may enter it directly in the “Select Customer” field found in the upper center section of the start page and click on the “Get CustNbr” button. If the customer number is valid the customer confirmation info will appear in the lower portion of the page.

  Via Customer Name
  If you need to find a specific customer by name (such as if the customer is calling you) you may enter a portion of their name in the “Select Customer” field and click on the “By Name” button. This will display a window of customer names that match the value you entered. Click on the green arrow (or doubleclick) for the customer you want to select - the customer confirmation info will appear in the lower portion of the page.

  Via Customer Phone
  If you need to find a specific customer by phone number (such as if the customer is calling you) you may enter a full or partial phone number in the “Select Customer” field and click on the “By Phone” button. This will display a window of customer phone numbers that match the value you entered. Click on the green arrow (or doubleclick) for the customer you want to select - the customer confirmation info will appear in the lower portion of the page.

- **To Add a New Customer**
  Click on the “Create a New Customer” link to add a new customer. A window appears so that you may enter the name, address, and other contact info for the customer. Some fields default from the “Add New Customer” defined in the billing transaction operator (IS-07-11, field 16). Click on the “Submit New Customer” button to create the new customer record and display the customer confirmation info.

Creating a New Order for a Customer

Once you have identified or created the customer for an order the customer confirmation info appears in the lower portion of the start page. This lets you confirm that this is the correct customer and also shows you info about any existing orders. You may click on the “Select an Existing Order” if you want to edit an existing open order for the customer.

- **To Add a Regular Order**
  Click on the “Create a Regular Order” button in the customer confirmation info. This will create a new Regular type order for the customer and then display the Order portal.

- **To Add a Credit Memo**
  Click on the “Credit” link in the customer confirmation info. This will display a window in which you may specify the Apply To invoice for the credit:
  - If you know the invoice number enter it in the “Invoice #” field and press the “Create the Credit” button. This will create the Credit type order for the customer (applied to the invoice) and then display the Order portal.
  - To find an invoice number you may click on the “select from a list of invoices” link. This displays a list of invoices for the customer. You may then select an invoice to create the Credit type order for the customer (applied to the invoice) and then display the Order portal.
  - To create an open (unapplied) credit you simply leave the Invoice # field blank and press the “Create the Credit”

button. This will create the Credit type order for the customer (with no apply to) and then display the Order portal.

- **To Add a No Charge Order**

  Click on the "No Charge" link in the customer confirmation info. This will create a new No Charge type order for the customer and then display the Order portal.

- **To Add a Quote**

  Click on the "Quote" link in the customer confirmation info. This will create a new Quote order for the customer and then display the Order portal.

Accessing the Standard Order Entry Program

(This option is available only if you are using the portal within a SouthWare login session)

You may access the standard Order Entry program (IS-01-02-01) to add or access an order via the "Go to Full Order Entry" link in the upper right of the start page. This allows you to access any order entry features available in this program.

Functions within the Order Header

The order header information is displayed at the top of the page. This includes customer info, PO and terms, order totals, and other general order info.

- **To Change Selected Order Header Info (PO, Comment, Salesperson, etc.)**

  Click on the Edit icon to display a window that allows you to edit selected header fields. Edit the fields shown then press the "Update Info" button to submit the changes.

- **To View Additional Totals**

  Click on the Totals Info icon to display a window that shows additional totals for the order.

A tool bar above the header information provides quick access to the following functions:

- **Refresh** - This function reloads the current page
- **Full Entry** *(available only if you are using the portal within a SouthWare login session)* - This function calls the standard Order Entry program (IS-01-02-01) for the order. The current order will be displayed in the program. When you exit the order you will return to the portal. If you made changes to the order you must use the Refresh function (see above) to reload the page and reflect the changes.
- **Hold** - This function toggles the hold status of the order. If the order is not on HOLD status this function will place it on hold. If the order is on HOLD then this function will remove the HOLD status.
- **Delete** - This function will delete the current order if it can be deleted.
- **E-Mail** *(available only if you are using the portal within a SouthWare login session)* - This function accesses the SouthWare e-mail function to allow you to send an e-mail to the customer for this order. Any of the available e-send IDs may be used.
- **Picking Ticket** *(available only if you are using the portal within a SouthWare login session)* - This function calls the standard picking ticket print program for this order.
- **Order Acknowledgement** *(available only if you are using the portal within a SouthWare login session)* - This function calls the standard order acknowledgement print program for this order.
- **Finish** - This function completes the order (including processing such as creating POs for purchase for items) and returns to the order entry start page.

The Order Items Tab

The Order Items tab shows the line items for the order and helps you quickly add new order line items.

Line Item List

A grid list displays the current line items for the order with totals at the bottom. You may sort or filter the items shown, and you may use the icons beside each item to Edit or Delete a line item.

Item Entry box

The Item Entry box displays in the middle of the page for quick entry of new line items:

- **Different Types of Items**

Via the Item Entry field you may enter a stock number (or a cross reference), a service code, a standard bill ID, or a vendor catalog number (non-stock item). When the page validates the Item it determines what type of ID you entered and displays confirmation info to the left of the Entry box.

- **Multi-Location**

  If you use multiple locations and your billing operator allows multiple locations on an order then a location drop-down list appears in the Item entry box. This lets you select the location for each item.

  If multi-locations do not apply then the location number will be displayed but may not be edited.

- **To Specify the Item Number for a New Line Item**

  In the Item No field you may enter a stock number, a cross reference, a service code, a standard bill ID, or a vendor catalog number:
  - If you know the item number simply enter it and press [Enter].
  - If you know the first characters of the number enter them and click on the “Find” button. This displays a stock number search list. Click on an item in the list to select it.
  - To search all types of items (stock, service, vendor catalog, standard bills) enter a key word and click on the “All” link. This displays a key word search list. Click on an item in the list to select it.
  - To search the vendor catalog enter a starting value and click on the “VndCat” link. This displays a vendor catalog search list. Click on an item in the list to select it.

- **After You Enter or Select an Item ID**

  After you enter or select an Item ID the page validates the ID. For a stock number some confirmation info and current quantity info appears to the left of the Entry box. If the ID is not valid an error will display and you may re-enter the ID.
  - For More Info on a Stock Item you may click on the “Inquiry” link. This displays a window with the standard Stock Item portal so that you can access most available info about the item.
  - For More Pricing Info you may click on the dollar icon to display a window of pricing info for the item.

- **To Change the Unit of Measure**

  If the item has multiple units of measure you may click on the Unit of Measure (which is a link). This displays a window of the available units of measure. To select a different unit simply select it from the list. This will update the Item Entry box with the selected unit of measure.
  - To Restore the Default Selling U/M use the link at the top of the Unit of Measure window. Clicking on this link will update the Item Entry box with the default selling unit of measure.

  Please note that changing the unit of measure affects only the unit of measure to be used for the item about to be added.

- **To Enter the Quantity**

  You may default to quantity 1 or enter a quantity. Press [Enter] or click on the “Add to Order” button. The unit of measure for the item appears to the right of the quantity field.

- **If a Stock Item Has Special Handling**

  If a stock item entered has special order handling defined in the stock record (such as Purchase For Sales Order) then this default handling will be used for the added line item.

- **If an Item Doesn’t Have Sufficient Quantity**

  If the item ordered doesn’t have enough available quantity for the quantity needed to ship, a window of options appears. The window shows the Order Qty, Available Qty, Qty Short, and any quantities available in other locations. The options shown are similar to the options available in the standard order entry program:
  - **Backorder Qty Ordered** - This will backorder the entire quantity ordered (if the customer allows backorders). *(For an Assembly item this option will be “Assemble All”)*
  - **Ship Available, B/O Rest** - This will use any available quantity and backorder the remaining quantity needed (if the customer allows backorders). *(For an Assembly item this option will be “Ship Available, Assemble Rest”)*
  - **Ship Available, Cancel Rest** - This will use any available quantity and then cancel the remaining quantity ordered.
  - **Cancel - Cancel Order of this Item** - This will cancel the ordered quantity and update the system so that this will be recognized as a lost sale.

- **Override and Ship Order Qty** - This will override the unavailable validation and specify that the entire order quantity is to be shipped from stock. *(This option is available only if your transaction operator allows you to override Stock-Out situations.)*
- **Purchase - Create PO for Order Qty** - This will change the handling code for the line item to be a Purchase From Vendor handling - when you finish the order the "Finish" function will create a purchase order for this line item. . *(This option is available only if the stock item Order Code allows purchasing.)*
- **Drop Ship - Order from Vendor** - This will change the handling code for the line item to be a Drop Ship from Vendor handling. *(This option is available only if the stock item Order Code allows drop ship purchases.)*
- **Substitutes** - If the item has substitute items available these will show as links. The link displays the available quantity for each substitute item. You may click on a substitute link to select a substitute item.

- **If an Item Has Related Items**

After you add a stock item that has related items then a related item window appears. The window shows a list of all related items. Click on the green arrow beside an item in the list (or double click on the item) to add it to the current order.

- The item for quantity 1 will be added as a new line item to the order.
- A green check mark will appear beside the item to indicate you have already selected that item.
- A confirmation message will appear above the list showing the item and quantity added.
- The order totals in the upper right of the screen will be updated.
- The "Order Items" list is updated.

- **To Enter a Miscellaneous Item**

If you enter a miscellaneous stock item (stock number begins with "*") the program will display a Miscellaneous Item window and ask you to enter the information needed for a miscellaneous sale:

- Item Description fields
- Quantity Ordered
- Unit of Measure
- Unit Price
- Unit Cost

Click on the "Add Item to Order" button to add the miscellaneous line item.

- **To Inquire a Stock Item**

You may inquire a stock item by entering the stock number (or use the search options to find it) and then clicking on the "Inquiry" link that displays beside the stock confirmation info to the left of the Entry box. The Inquiry link displays a window with the standard Stock Item portal so that you can access most available info about the item.

- ` **To Edit a Line Item**

Click on the edit icon beside a line item to access the line item edit window. In this window you can view more details about the line item and edit selected information. The standard fields* you may edit include:

- Description
- Line Item Text
- Ship Date
- Quantity Ordered
- Quantity to Ship
- Unit Price

* You may customize this window to allow editing of additional fields

If you change any fields you must click on the "Update Info" button to submit the changes.

A tool bar at the top of the line item edit window provides quick access to the following functions:

- **Refresh** - This function reloads the line item edit window
- **Full Edit** *(available only if you are using the portal within a SouthWare login session)* - This function calls the standard Order Entry program (IS-01-02-01) for the order line item. The current line item will be displayed in the program. This allows you to access any of the fields and functions of the standard order entry program. When you exit the order you will return to the portal. If you made changes to the order you must use the Refresh function (see above) to reload the page and reflect the changes.

- **(Serial or Tracking #)** *(available only if you are using the portal within a SouthWare login session AND the item uses serial or tracking numbers)* - This function calls the serial/tracking number selector program to display a list of available tracking numbers. This is the same selector program used in the standard order entry program. You may select tracking numbers for the line item. When you exit the selector the edit window will refresh to show the tracking number totals.
- **Cancel** - This function will cancel the quantity for the line item.
- **Delete** - This function will delete the line item from the order.
- **Exit** - This function will exit the window without further editing - if you changed fields but did not click on the Update Info button then the changes are not saved.

- **To Delete a Line Item**

  The quickest way to delete a line item from the order is to click on the delete icon ✖ beside the line item in the line item grid listing. This removes the line item and refreshes the grid list and the order totals. You may also delete a line from the Line Item Edit function or by going to the Full Edit program to delete the line.

The Billing/Payment Tab

The Billing/Payment Tab shows the current billing info for the order. You may edit the information shown here and then press the "Update Billing/Payment Info" button to submit the changes to the order.

- **Billing Address** - This initially uses the default billing address for the customer. If the customer has multiple billing addresses on file you may select one from the drop down list.
- **Additional Charges** - This shows any charges that have already been added to the order. You may add freight and other add on charges by selecting a charge type from the drop down list and entering a related amount.
- **Payment** - This shows any payments already recorded for the order. You may add cash or check information in this screen. To add a credit card payment or other payment type:
  - *(if you are in a SouthWare login session)* you may enter an amount (the default is to the remaining balance due) and click on the Credit Card/Other button. This uses the same entry routine as the standard order entry program. If you interface to PC Charge the payment information is submitted for pre-authorization.
  - *(if you are NOT in a SouthWare login session)* - ??????

Be sure to press the "Update Billing/Payment Info" button if you make changes to this information.

The Shipping Tab

The Shipping Tab shows the current shipping info for the order. You may edit the information shown here and then press the "Update Shipping Info" button to submit the changes to the order.

- **Shipping Address** - This initially uses the default shipping address for the customer:
  - If the customer has multiple shipping addresses on file you may select one from the drop down list.
  - To add a new shipping address you may click on the "Add Shipping Address" link. This displays a window and allows you to create a new ship to record for the customer. After adding a new shipping address the address will be added to the drop down list. You must select the new address and do the Update function in order to choose this address for the order.
- **Ship Via** - This initially uses the default ship via code for the customer. You may select any valid ship via code from the drop-down before updating.
- **Ship Date** - This initially defaults to the order date. You may enter or select a new ship date from the pop-up calendar that appears.

Be sure to press the "Update Shipping Info" button if you make changes to this information.

The Text Tab

The Text tab shows any existing header or trailing text for the order header and lets you edit the text.

- **To Add/Edit Header Text**

  The Header Text field shows any header text already entered for the order. You may edit or add text to this field. After editing click on the "Update Header Text" button to submit the changes.

- **To Add/Edit Trailing Text**
  The Trailing Text field shows any trailing text already entered for the order. You may edit or add text to this field. After editing click on the "Update Trailing Text" button to submit the changes.

<u>The Recent Purchases (or Invoice) Tab</u>

The Recent Purchases tab shows you items the customer has purchased in the past with the most recent items first. This lets you quickly create an order when the customer says "I want some of the same things I bought last time."

- **To Add a Previous Purchase to the Current Order**
  Click on the green arrow beside an item in the list (or double click on the item) to add it to the current order.
  - The item and the previous quantity purchased will be added as a new line item to the order.
  - A green check mark will appear beside the item to indicate you have already selected that item.
  - A confirmation message will appear above the list showing the item and quantity added.
  - The order totals in the upper right of the screen will be updated.
  - The "Order Items" tab is updated for the item - when you return to this tab the item will be shown in the list of line items.

- **If there is Insufficient Quantity Available for the Previously Purchased Quantity**
  If the quantity for the previous purchase is not available, a window appears and gives you quantity options. These are the same options discussed above under the "If the Item Doesn't Have Sufficient Quantity" section of the Order Items tab.

<u>Applied Credit Memo</u>

If this is a credit memo applied to a specific invoice then this tab shows the items purchased on that invoice. This lets you quickly select which items are to be returned via the credit memo.

- **To Add a Previous Purchase to the Current Order or Credit**
  Click on the green arrow beside an item in the list (or double click on the item) to add it to the current credit.
  - The item and the previous quantity purchased will be added as a new return line item to the credit.
  - A green check mark will appear beside the item to indicate you have already selected that item.
  - A confirmation message will appear above the list showing the item and quantity added.
  - The order totals in the upper right of the screen will be updated.
  - The "Order Items" tab is updated for the item - when you return to this tab the item will be shown in the list of line items.

- **To Return All Items for a Credit Memo**
  For a credit memo with an apply to invoice a convenience link labeled "Return All Invoice Items" appears at the top of the Invoice tab. You may click on this link to add each item from the invoice as a return line item to the order. Each item will go through the normal processing to validate quantities, update totals, etc.

<u>Standard Order Entry Features Not Available in Web Order Entry Portal</u>

The features outlined above are the primary features available in the Order Entry portal. Other features supported in the standard order entry program are not currently available in the Web Order Entry Portal. <u>You must use the standard order entry program (available as "Full Edit" option) for features not outlined above.</u>

The list below shows some examples of standard order entry features that are not currently available in the portal. ***This is NOT a complete list of unavailable features*** and this list may change as new features are added to the Web Order Entry Portal:

- No Rental transactions
- No Matrix item entry
- No Assembly optional components
- No interactive creation of Assemblies - you may enter assemblies in the portal but must use the batch assembly generation process to create the work orders
- No one-step orders (the order entry portal handles two-step orders) - you may not use a one-step billing operator for the portal
- No Select for billing features
- No invoice printing

- No entry of header fields and line item fields not included in the web pages - these could be customized to add additional fields
- No Access/update of Extended Data fields (header and line item)