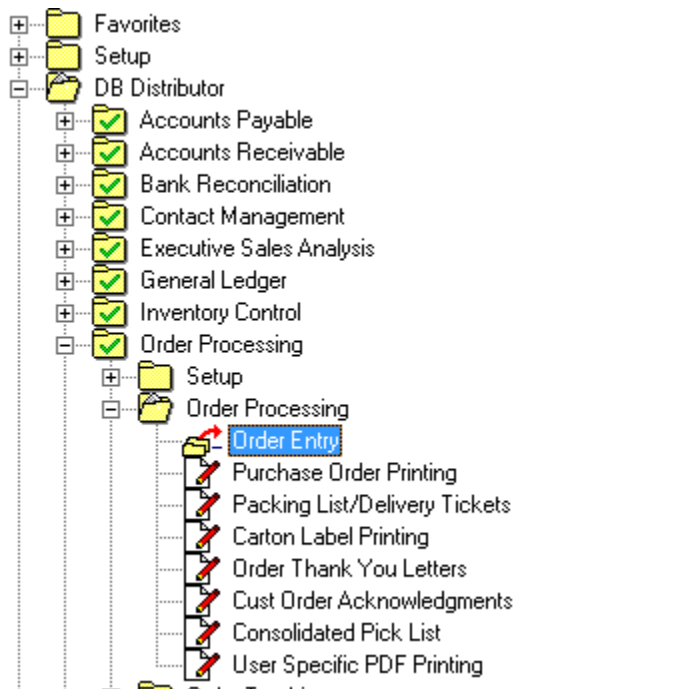


## **ORDER PROCESSING - Streamlined**

### **Sales Order Entry**



**Path: DB Distributor > Order Processing > Order Entry**

This document provides a quick overview of the fields and panels used for sales order entry using the Summary Panel for Order entry lines.

**d** Order Entry Defaults - FMGODX

Order Date: 04/23/2018

Order Division: 00-DIVISION 00-HEADQUARTERS

Order Type:  Sales Order  Bill as Shipped  
 Release  Billable Release

CSR: ASC Anita Corless

FOB: D - Destination      How to Ship: A - Prepaid & Add      Ship VIA: S - Standard

Proceed      Exit

Order Date

Verify Information is correct for the orders you are entering now, set the Order type and click **Proceed**

**d** Sales Order Entry - FMGODM

Order Number: 00      Customer: -

Add New Order      Order Date:      Date Requested:

Get next new order # from: Order #      On P/O:      Salesperson:

Header    Lines    Shipping    Notepad    Purchase Order    Item Specs    **Entry Defaults**    Job Note

Line	Description/Item	Ordered	U/M	Amount	Cost	Gross Profit	GP%	Shipping

Exit

Order Number

Click **Add New Order**

Enter your Customer Number or use the query option to select your customer code

Lookup	Customer	Name	Salesperson	Address
AMERICAN A	00-00100	American Advertising, Inc.	Lori Cave	109 Regency Drive
AMERICAN A	00-10000	American Advertising, (Bill From)	Warren M. Zindler	1487 Techwood Avenue
AMERICAN P	00-00521	American Paper Company	Jesse Bryan	123 Pine Valley Way
ANITA LONG	00-ANITA	Anita Long's Company	Robyn Shumaker	57 Huey Drive
ANOTHER CA	00-00286	Another Cave	Lori Cave	
APPLY PLAC	00-00124	Apply Place	Lori Cave	123 Apple Spice Way
APPLY PLAC	50-00605	Apply Place	Warren M. Zindler	123 Apple Spice Way
APRIL	00-00701	April	Theresa M. Anderson	11 Catus Rd
ASN CAVE G	12-01006	ASN CAVE Group	Warren M. Zindler	

Example of Query – in this case, position over the desired customer number and double click or return to select.

The screenshot shows a software window titled "Sales Order Header - FMGODA". At the top, the "Order Number" is 00-024750. Below this is a tab labeled "1. Customer Info". The main content area is divided into several sections:

- Customer:** 00-00100, American Advertising, Inc.
- Customer P/O:** AJ-8702414
- Order Date:** 04/23/2015
- Date Requested:** 04/30/2015
- Ordered by:** Mr. George Jackson
- Terms:** 02, 2% 10 days Net 30
- Address:** 109 Regency Drive, Suite 100
- City:** Norcross
- State:** GA, **Zip Code:** 30071-
- Phone:** (770)448-1484.

Below the address section are two sub-sections:

- Order Type:**
  - Sales Order
  - Release
  - Bill as Shipped
  - Billable Release
- Order Options:**
  - Freight Markup:** 02

At the bottom of the window are buttons for "Repeat Order", "See Images", "Cancel", "Finish", and "Next >". A status bar at the very bottom shows "Ordered by".

As needed enter:

- Customer P/O
- Date Requested
- Freight Markup – this will default from Customer if preset.

Verify the Order Type is correct for this order; this information will default from the Order entry Default panel.

Click **Finish** to proceed to order entry lines.

At Order Line No: Click **New Line**

At the P/O code field, you have several options. The single character segment in this field can trigger specific output options. Your DB/d representative can help you define options that best meet your needs. Here are 3 examples for the P/O Code.

1. Use a 'Number' at this field if you are ordering a custom Item specific to this customer, the Custom Box would then be checked and the Line Type would be set to Manufactured item.

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.  
 Order Line No.: 001 New Line  
 P/O Code: 1 Custom:  Line Type: Manufactured Item Specs Required: Full Specs Custom Item Line Type: New  
 Customer: 00-00100 Item Code: DP-550 Description: #10 White Envelope with Color Logo

2. Use a 'Letter' at this field if you are ordering stock item from a vendor to be shipped direct to your customer. In this case, the Custom field would NOT be checked. This range of PO codes can be used to print stock PO form.

P/O Code: A Custom:  Line Type: Stock Item Specs Required: Full Specs Custom Item Line Type:  
 Item Code: 0002000 Description: Four Across Continuous Labels

3. Leave Blank if this is an inventory item coming out of your Distributor Warehouse location.

P/O Code: Custom:  Line Type: Customer Specific Item Specs Required: No Specs Custom Item Line Type:  
 Customer: 00-00100 Item Code: MAILER Description: Mailer  
 Warehouse: 9002

Sales Order Entry for Custom Item:

**Order Line Entry - FMGODB.V7**

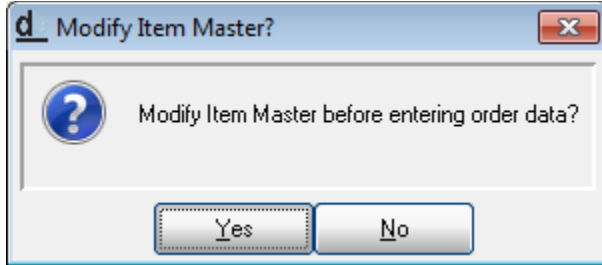
Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.  
 Order Line No.: 001 New Line  
 P/O Code: 1 Custom:  Line Type: Manufactured Item Specs Required: Full Specs Custom Item Line Type: New  
 Customer: 00-00100 Item Code: DP Description:

**Customer Specific Items - QRY\_FM1**

Start From: DP

Item Code	Item Description	Left-Right	Top-Bottom	Plys	Prd Cd	Order Date	Order No.	Customer's Item
DP-100	Continuous Accounts Payable Check	9 1/2	7	03	001	07/28/2008	00-018661	CICCODEISAPCH
DP-120	#10 White Envelope				002	12/01/2012	00-006977	
DP-200	Continuous Invoices	9 1/2	11	05	001	.	.	APP K50SCT
DP-300	Payroll Check 101	9	7 1/2	02	006	03/21/2013	00-024269	
DP-340	#10 Large White Envelope				002	.	.	
DP-40	#10 White Envelope				002	.	.	
DP-400	Continuous Customer Statements	9 1/2	7	03	001	11/20/2003	00-008698	NS 25

At the Item Code, enter your Item Code or Use the Query option and select from the Drop Down for this customer. If the item you wish to order is not listed, you will be given the option to add. For purposes of this example, Item DP-340 will be selected



This option will always display, a good practice is to select **Yes** and review setups for all items, and change if needed. If these are items that you are reordering and as you become comfortable with order entry, you may select **No** and just proceed with Entry of Line.

Line	Description/Item	Ordered	U/M	Amount	Cost	Gross Profit	GP%	Shipping

After reviewing the Custom Item master, you will be returned to Order Entry line to enter your Quantity.

The Packaging, Cost, Sell, and vendor information is defaulted from the Custom Item master; you have the ability to modify this information for the purpose of this order at this time. If you are using RC Numbers for this customer, you will enter at this time (this is not a required field).

If this line item is to ship to a warehouse or to be shipped to multiple customer locations, then you would also Check the Special Shipping field. If this line item is shipping direct to your customer, you will leave this field Blank.

Click **Save**

**Purchase Order Setup - POGMAA.OR**

P/O Number: 00-024750-1

Vendor	Plant
Code: 00-WISCO <input type="text"/> <input type="button" value="Search"/>	Code: <input type="text"/> <input type="button" value="Search"/>
Name: Envelopes - Wisco Envelopes, Inc.	Plant Name: Envelopes - Wisco Envelopes, Inc.
Attn: Mr. Riley Mcdole	Attn: Mr. Riley Mcdole
Address: 1234 Main Street Suite 100	Address: 1234 Main Street Suite 100
City: Norcross State: GA <input type="text"/> <input type="button" value="Search"/>	City: Norcross State: GA <input type="text"/> <input type="button" value="Search"/>
Zip Code: 30071- Phone: (770)448-1484.	Zip Code: 30071- <input type="text"/> <input type="button" value="Search"/> Phone: ( ) - .

P/O Type: C New / Repeat: New  Sales Order/Customer: 00-024750 00-00100

Print this P/O:  Yes  No  Print  Suspended

Confirming:  Vendor PO XML sent?

P/O Date: 04/23/2015

Gr. Cutoff Date:

Date Requested: 04/30/2015

Terms: 01   Net 30 days

Send Vendor Data:

Cust PO/Sls#/Cust Rep: AJ-8702414 LMC ASC

Rush Service Person:  No Days: 0

Plant Quote No.:

Previous Job No.:

Job Number:

Job Status:

Proof Status Date: Not Required

Scheduled Ship Date:

Vendor

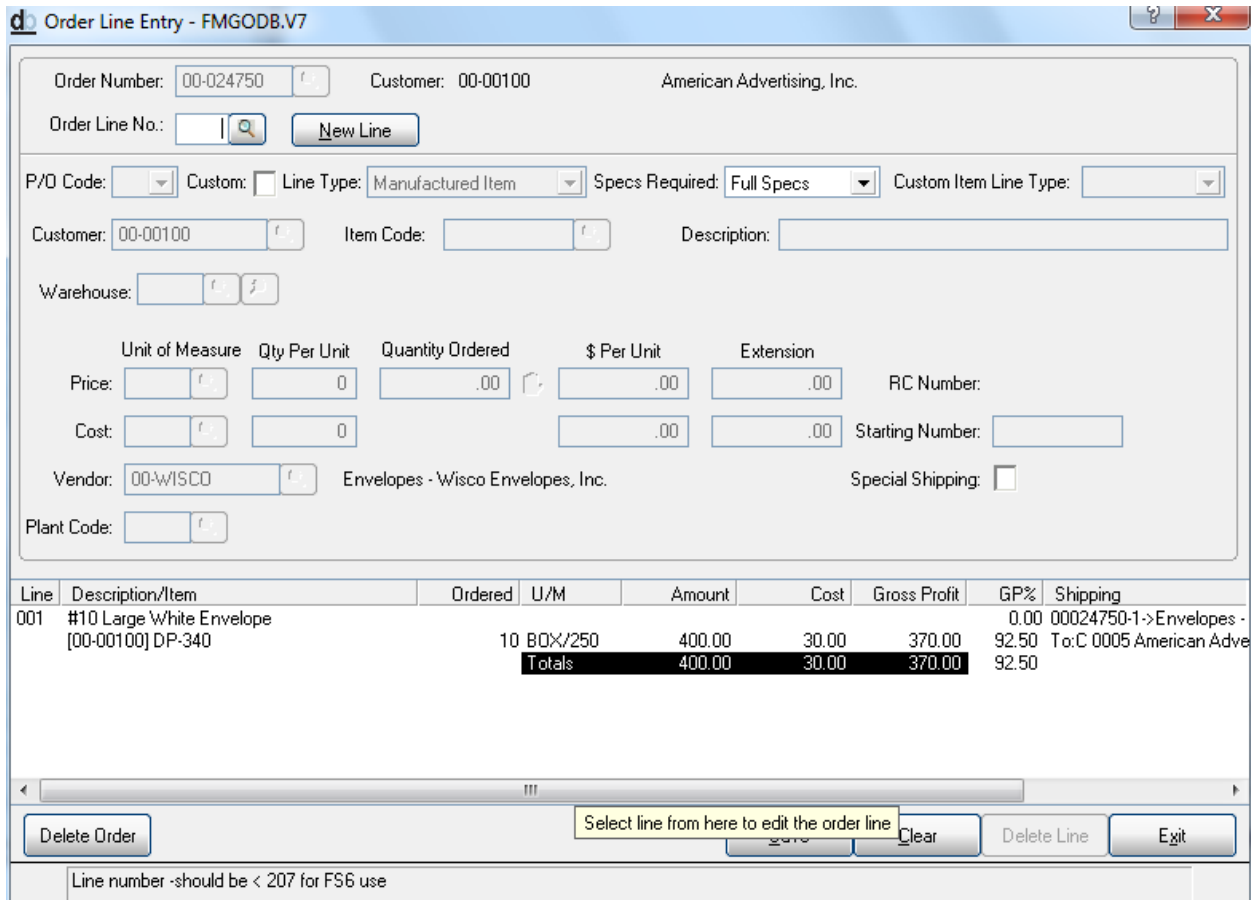
Purchase Order Setup Panel. This panel will always display once for each unique PO code entered in the order lines. Verify the vendor and plant, enter job information if appropriate.

Click **Save**





This question will appear for custom items to allow you to make changes to the specifications for this order. Select the appropriate option, after changes are made to Specification, you will be returned to



Order line entry.

You now have the ability to Exit order entry lines or another line can be added.

db Order Line Entry - FMGODB.V7

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.

Order Line No.: 002 New Line

P/O Code: A Custom:  Line Type: Special Charge Specs Required: No Specs Custom Item Line Type:

Item Code: ART Description: Artwork - Enter Qty

Unit of Measure	Qty Per Unit	Quantity Ordered	\$ Per Unit	Extension	RC Number
Price: EACH	1	1.00	19.95	19.95	101
Cost: EACH	1	1.00	10.00	10.00	Starting Number:

Vendor: 00-GRAPH Graphics Art of America, Inc. Special Shipping:

Plant Code:

Line	Description/Item	Ordered	U/M	Amount	Cost	Gross Profit	GP%	Shipping
001	#10 Large White Envelope [00-00100] DP-340	10	BOX/250	400.00	30.00	370.00	92.50	00024750-1->Envelopes - To: C 0005 American Adve
				<b>Totals</b>	<b>400.00</b>	<b>30.00</b>	<b>370.00</b>	<b>92.50</b>

Delete Order Select line from here to edit the order line Save Clear Delete Line Exit

Vendor

This is an example of an ART charge that has been added to PO code A for vendor GRAPH.

The Artwork is being done by a different vendor in this example.

Click **Save**

**db Order Line Entry - FMGODB.V7**

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.

Order Line No.:

P/O Code:  Custom:  Line Type: Special Charge Specs Required: No Specs Custom Item Line Type:

Item Code:  Description:

Warehouse:

Unit of Measure	Qty Per Unit	Quantity Ordered	\$ Per Unit	Extension	RC Number:
Price:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Cost:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Starting Number: <input type="text"/>

Vendor: 00-GRAPH Graphics Art of America, Inc. Special Shipping:

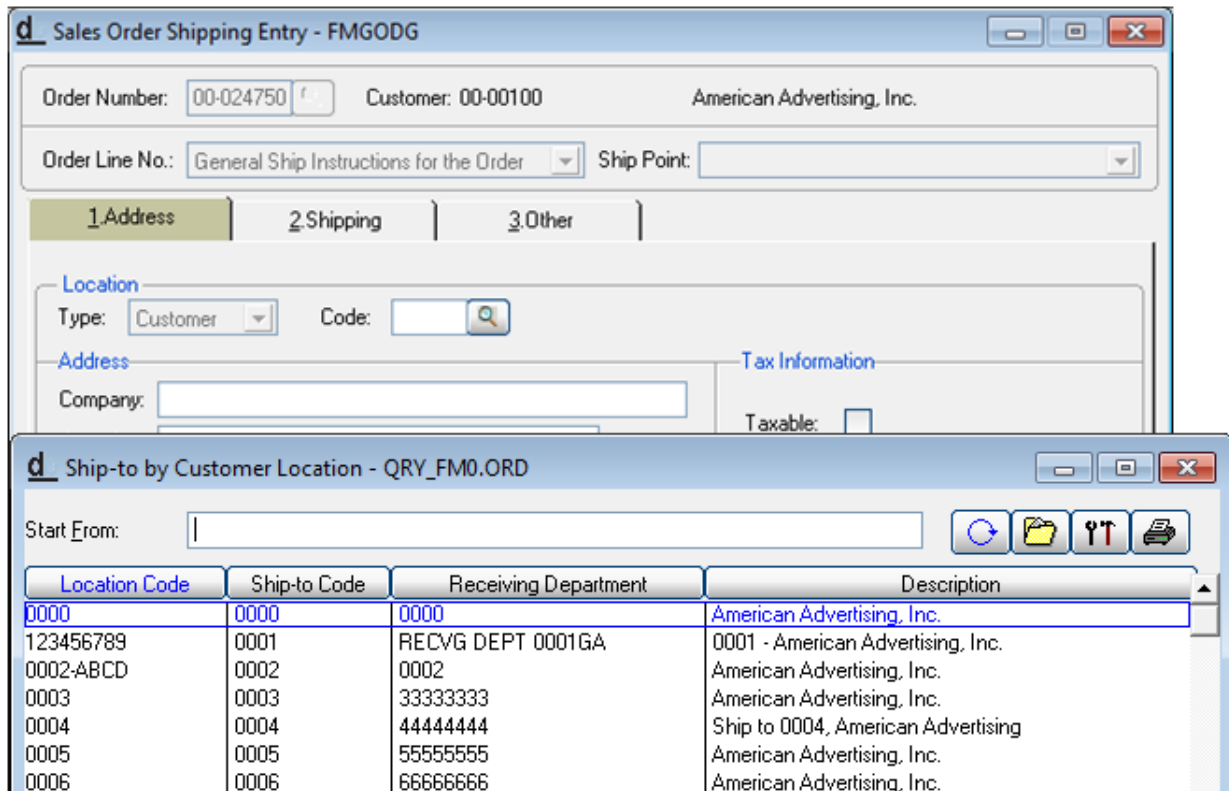
Plant Code:

Line	Description/Item	Ordered	U/M	Amount	Cost	Gross Profit	GP%	Shipping
001	#10 Large White Envelope [00-00100] DP-340	10	BOX/250	400.00	30.00	370.00	92.50	To:C 0005 American Adve
002	Artwork - Enter Qty ART	1	EACH/1	19.95	10.00	9.95	49.87	To:C 0005 American Adve
<b>Totals</b>				<b>419.95</b>	<b>40.00</b>	<b>379.95</b>	<b>90.48</b>	

Line number -should be < 207 for FS6 use

After all lines are entered for this order

Click **Exit**



Sales Order Entry Shipping Information for Order.

At the Code Field, enter the appropriate ship to location code for this customer or use the Query button and select from Drop Down.

**d Sales Order Shipping Entry - FMGODG**

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.

Order Line No.: General Ship Instructions for the Order Ship Point:

1.Address | 2.Shipping | 3.Other

**Location**  
Type: Customer Code: 0005

**Address**  
Company: American Advertising, Inc.  
Attention: Mr. George Jackson  
Address: 1487 Techwood Avenue  
Suite 500  
City: Atlanta  
State: GA Zip Code: 30303

**Tax Information**  
Taxable:   
Sales Tax: GA-30303-010  
GA-FULTON-ATLANTA

**Cost Code**

Mark For:

Done Next >

Enter Mark For if needed.

Click **Next**

**d** Sales Order Shipping Entry - FMGODG

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.

Order Line No.: General Ship Instructions for the Order Ship Point:

1.Address | **2.Shipping** | 3.Other

FOB: P - Plant  
How to Ship: A - Prepaid & Add  
Ship VIA: G - U.P.S. Ground

Inside Delivery:   
Ship With:   
Ship Via Override: Next Day Air

E-Mail Address:   
Account Number:

Wrap label/Drop Ship: Drop Ship  
Will Call/Ship Out: Ship Out  
OP Account:

< Back Next >

Freight on Board

Review Shipping Information, change as needed.

Click **Next**

**d** Sales Order Shipping Entry - FMGODG

Order Number: 00-024750 Customer: 00-00100 American Advertising, Inc.

Order Line No.: General Ship Instructions for the Order Ship Point:

1.Address | 2.Shipping | **3.Other**

Warehouse:

Vendor:

Plant Code:

< Back Finish

Press to Finish

This screen is used for Special Situations.

Click **Finish**

**db Sales Order Entry - FMGODM**

Order Number: 00-024750    Customer: 00-00100    American Advertising, Inc.  
 Add New Order    Order Date: 04/23/2015    Date Requested: 04/30/2015  
 Get next new order # from: Order #    On P/O: AJ-8702414    Salesperson: LMC    Lori Cave

Header    Lines    Shipping    Notepad    Purchase Order    Item Specs    Entry Defaults    Job Note

Line	Description/Item	Ordered	U/M	Amount	Cost	Gross Profit	GP%	Shipping
001	#10 Large White Envelope [00-00100] DP-340	10	BOX/250	400.00	30.00	370.00	92.50	0.00 00024750-1->Envelopes - W To: C 0005 American Advert
002	Artwork - Enter Qty ART	1	EACH/1	19.95	10.00	9.95	49.87	00024750-A->Graphics Art d To: C 0005 American Advert
<b>Totals</b>				<b>419.95</b>	<b>40.00</b>	<b>379.95</b>	<b>90.48</b>	

See Images    Select line from here to edit the order line    Save    Delete Order    Exit

Sales Order Entry

This is the order Summary, Review for Accuracy. You may select any of the boxes under the order number to make changes to specified areas for this order.

If you wish to enter another order:

Click **Save**

If you are finished with Order entry and wish to proceed to another function:

Click **Exit**



The Streamlined / Summary Entry option is triggered by an option in the Application Security by Operator Parameters. To continue to use the original design, this box would be blank. Click once to check the box to use the Grid option, and twice to cycle to the "X" and take advantage of this new and improved Summary Entry option

