



Sales Order Entry



The screenshot shows the Sage Sales Order Entry form for TTT 3/16/2019. The Order Number is S414886. The Order Date is 3/16/2019. The Order Type is Standard Order. The Customer No is CROSS01 (CROSSFIRE, LLC). The Cust PO is TBD and the Job Number is P100011. The Ship To Addr is WC06 (CROSSFIRE LLC). The Terms Code is 60 (60 days). The Ship Via is WC/WHSE006 (FOB ORIGIN). The Confirm To is ACCOUNTS PAYABLE. The E-mail is ap@crossfire-llc.com; emily.mccleney@crossfire-llc. The Telephone No is (123)456-7890. The Comment is blank. The Salesperson is 0023 (Randy McKinley). The Status is New. The Whse is 006 (Pecos TX). The Sales Tax Schedule is AVATAX. The AvaTax Schedule is blank. The Invoice Ready checkbox is checked.

1 Click the “Next” button to generate the next sales order number, which looks like this:

2 Select the Order Type from the drop down menu

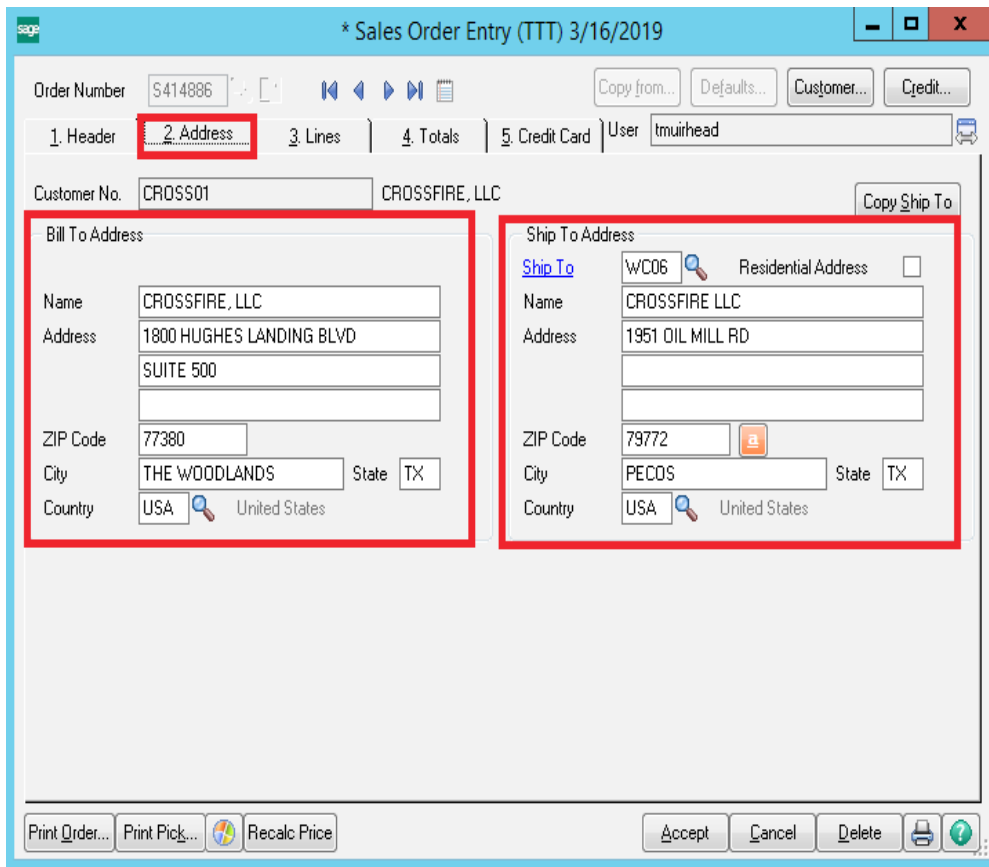
3 Enter the customer Number (use the search button if you don’t know the customer’s number.), PO (if your customer hasn’t given you a PO yet enter “TBD” in all caps), and Job Number.

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4 Select the correct warehouse and enter Avatax in the tax schedule.

5 Enter the Ship Via (how the order will be delivered). If the company being used isn’t available contact schain@crosscountryis.com to have them add it.

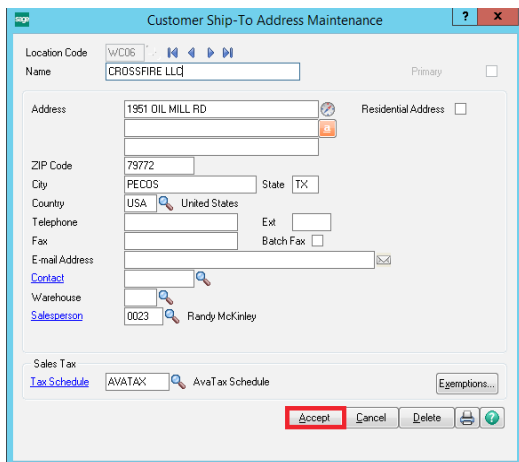
6 Enter the confirm to and salesperson number.



7 On the Address tab the Bill To will autopopulate from the customer's info in the system.

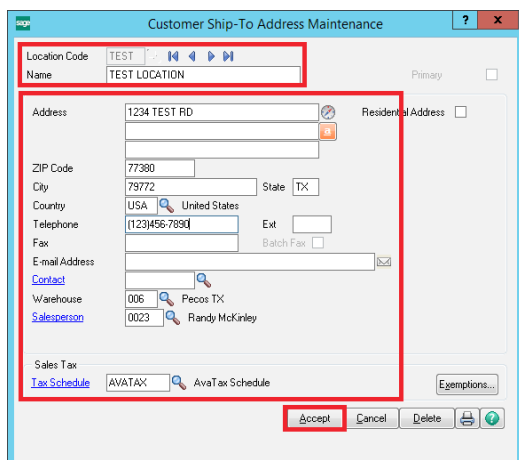
8 Enter the Ship To Address and verify it's a good address by selecting the Avatax key which looks like this: 

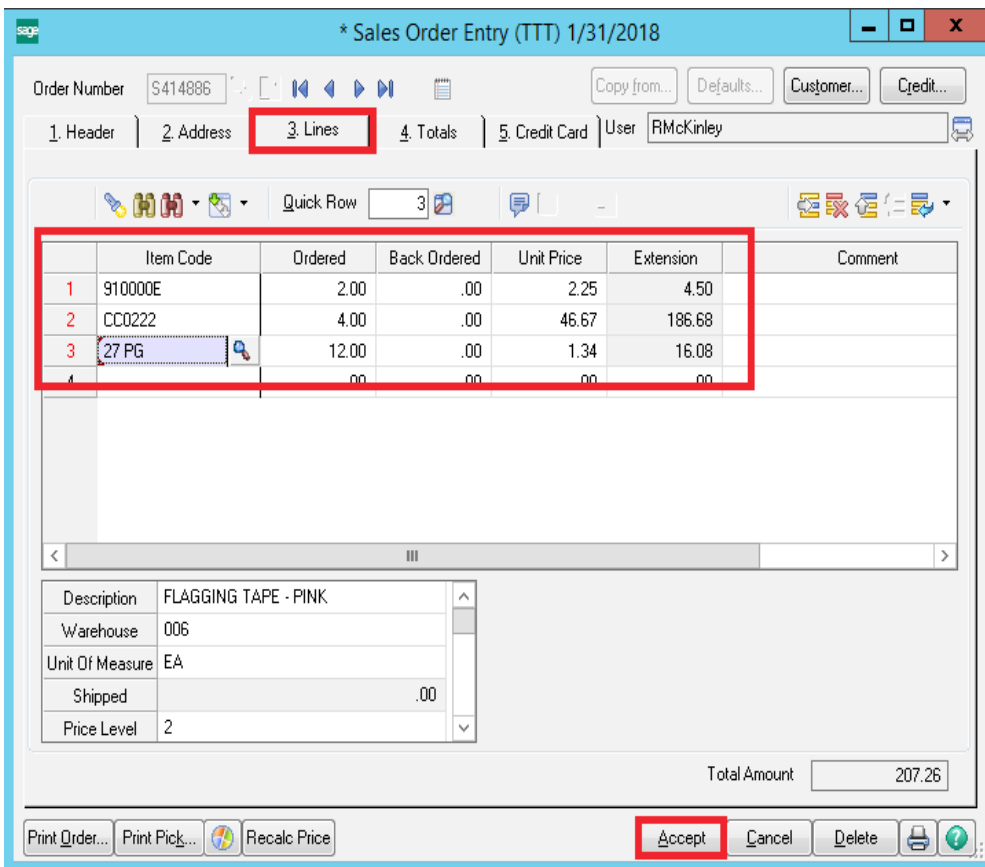
★ If you don't have a good address please enter GENERAL DELIVERY on the first address line.



★ If the customer has a new address they're using frequently, create a new ship to by clicking the blue words "Ship To". Click accept on the window to create a new ship to. Type in caps a 4

letter description for the new location, the name, a good address, the warehouse for the location, salesperson, contact name and number, and make sure the tax schedule says AVATAX. Then click accept to save.



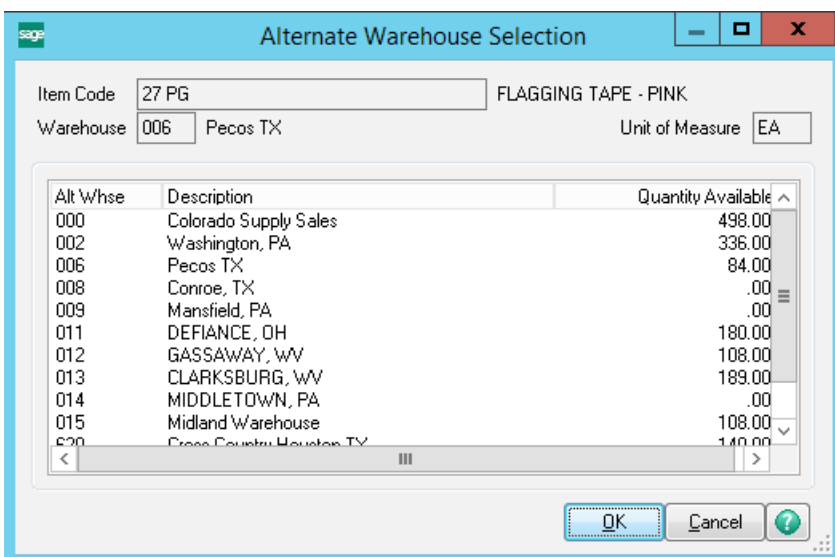
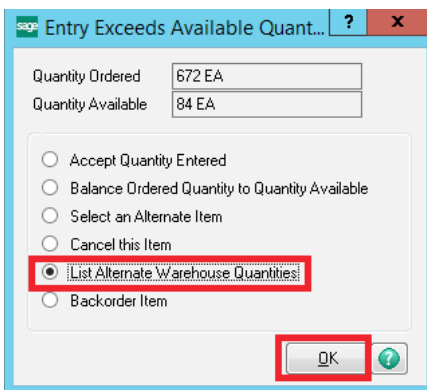


9 On the lines tab, enter the Item Code, Quantity Ordered, and Unit Price. The unit price should populate based off of tier pricing. The only times pricing should change is if the salesman made a special price with the customer for the items (which should be relayed by the salesperson), or if it's one of the items at the end of this document.

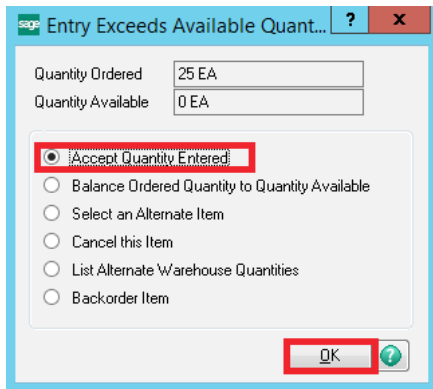
10 The extension should automatically populate based off of the quantity ordered times the unit price.

11 If there isn't enough quantity in the warehouse the sales order is being written out of, you'll want to select "List Alternate Warehouse Quantities" to pull from one of the available options.

12 From the Alternate Warehouse Selection screen, you will be able to select the warehouse you want to pull from. Sage will automatically do the transfer, there's no need to do a manual transfer in transaction entry.

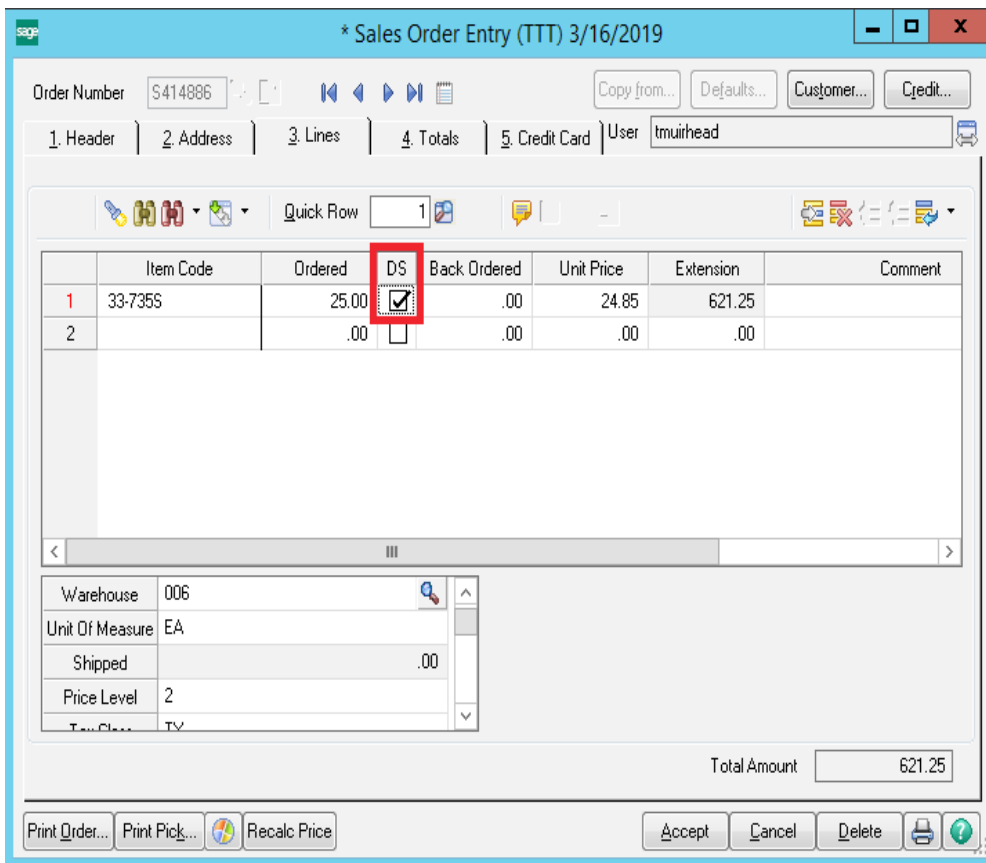


★ You MUST verify with the alternate warehouse that they can send the items needed BEFORE just selecting that warehouse.



11.1 If no warehouses can spare the items, a buy out will need to be done. Select “Accept quantity entered” and click Ok.

Drop Ship Purchase Order Process:



12.1 Click the “DS” (drop ship) box. Continue on with the rest of the sales order. After all above steps are finished, a PO will need to be cut for the drop ship items, *If a drop ship PO needs cut, refer to the last four pages of this job aid*

* Sales Order Entry (TTT) 1/31/2018

Order Number: S414886

1. Header | 2. Address | 3. Lines | **4. Totals** | 5. Credit Card | User: RMckinley

Order Date: 10/14/2017 | Order Type: Standard Order | Tag Detail...

Customer No.: CROSS01 | CROSSFIRE, LLC | Salesperson: 0023

Amount Subject to Discount: 207.26 | Deposit Payment Type: CHECK | CHECK

Discount Rate: .000% | Check Number: | Deposit Amount: .00

Discount Amount: .00

Taxable Amount: 207.26 | Commission Rate: 0.000%

Non-Taxable Amount: .00 | Sales Tax Amount: 17.10

Order Total: 224.36

Ship Zone: | Ship Weight: | Freight Amount: .00

Print Order... | Print Pick... | Recalc Price | **Accept** | Cancel | Delete

13 On the Totals tab print (or email) a copy of the pick ticket to get to the warehouse team to pull.

14 Before finalizing the order, go back through all the tabs to verify the information is all correct.

15 Hit accept to finalize the Sales Order.

16 After the product has been delivered, you have a signed copy from the customer, and a good PO go back into the sales order.

On the bottom right of the header tab, in the Invoice Ready box type "YES". If the order isn't ready to be invoiced (i.e. you're waiting for freight), enter the reason in the Invoice Ready box. Once it's ready, go back and change the reason to "YES".

17 Click accept on the bottom right to close the sales order.

* Sales Order Entry (TTT) 4/1/2019

Order Number: S453619

1. Header | 2. Address | 3. Lines | **4. Totals** | 5. Credit Card | User: mhubert

Order Date: 2/11/2019 | Order Type: Standard Order | Master/Repeating No.:

Customer No.: KEYST01 | KEYSTONE CLEARWATER SOLUTIONS

Cust PD: 19-00263 | Job Number: P001000

Ship Date: 2/14/2019

Ship To Addr: W09 | KEYSTONE CLEARWATER SOLUTIONS

Terms Code: 01 | Net 30

Ship Via: WC/PA009 | FOB MANSFIELD

Confirm To: MATT BARTLETT

E-mail: invoices@keystoneclear.net

Telephone No: 724-776-1494

Comment:

Salesperson: 0100 | Michael Hubert

Status: Hold | Reason: | Whse: 009 | Mansfield, PA

Sales Tax: AVATAX | Invoice Ready: YES

AvaTax Schedule:

*printed

Quick Print Without Displaying Printing Window

Print Order... | Print Pick... | Recalc Price | **Accept** | Cancel | Delete

★ As the person entering the sales order it's your responsibility to get a good PO from the customer or salesperson having you write the order.

The screenshot shows the Sage Purchase Order Entry (TTT) 3/17/2019 window. The interface includes a header with the Sage logo and window title. Below the header, there are navigation tabs (1. Header, 2. Address, 3. Lines, 4. Totals) and a user field (tmuirhead). The main form area contains several sections:

- Order Information:** Order Number (0096961), Date (3/17/2019), Type (Drop Ship), Sales Order (S414886).
- Vendor and Customer:** Vendor No. (00-DENSO), DENSO NORTH AMERICA, Customer No. (CROSS01).
- Order Status:** New, Required Date (3/17/2019).
- 1099 Form:** None, 1099 Box.
- Sales Tax:** RESALE.
- Ship To Address:** W/C06 CROSSFIRE LLC, Terms Code (01 Net 30), Ship Via (WCA/WHSE006 FOB ORIGIN), Warehouse (006 Pecos TX).
- Contact Information:** Confirm To, E-mail, Telephone ((281) 821-3355), Fax ((281) 821-0304), Batch Fax, Credit Card? (NO).
- Comments and Actions:** Comment (SEND TO CUSTOMER SO# S414886), On Hold, Print Order (checked).

 The bottom of the window features a Quick Print button, Entry Currency (USD), and Accept, Cancel, and Delete buttons.

1 Go to PO Entry and generate the next PO number.

2 Change the Type to Drop Ship.

3 After selecting Drop Ship there will be a box to the right, enter the sales order number the item(s) are being ordered for.

4 Enter the Vendor Number. If you don't know it, you can look it up with the magnifying glass.

5 The Ship To, Ship Via, and Warehouse will populate from the sales order info that pulls over, verify that it is correct.

★ If purchasing with a credit card, select Comdata as the vendor and make sure to enter the business the items were purchased at in the comment line and select "YES" that it was a credit card purchase. On the lines tab you will need to enter a comment line by typing /C in the item code spot under the items purchased. Enter the business name, address, phone number, and the contact name.

sage * Purchase Order Entry (TTT) 3/17/2019

Order Number 0096961

1. Header | 2. Address | 3. Lines | 4. Totals | User tmuirhead

Vendor No. 00-DENSO DENSO NORTH AMERICA

Purchase Address

Location

Name DENSO NORTH AMERICA

Address 9747 WHITHORN DR

ZIP Code 77095

City Houston State TX

Country USA

Telephone (281) 821-3355 Ext

Fax (281) 821-0304

Ship-To Address

Ship To WC06

Name CROSSFIRE LLC

Address 1951 OIL MILL RD

ZIP Code 79772

City PECOS State TX

Country USA United States

Quick Print... Entry Currency USD Accept Cancel Delete

6 On the Address tab the Purchase Address populates from the vendor's info in A/P.

7 The Ship To will populate from the info on the sales order, verify that it is correct.

sage * Purchase Order Entry (TTT) 3/17/2019

Order Number 0096961

1. Header | 2. Address | 3. Lines | 4. Totals | User tmuirhead

Quick Row 2

Item Code	Ordered	Back Ordered	Unit Cost	Extension	Serial Number
1 7200-75L	300.00	.00	1,515.18	454,554.00	
2	.00	.00	.00	.00	

Description Warehouse Unit of Measure Qty Received .00

Total Amount 454,554.00

Quick Print... Entry Currency USD Accept Cancel Delete

8 On the Lines tab the items that are being ordered from the vendor will populate from the sales order, verify the quantity ordered and price are correct.

* Purchase Order Entry (TTT) 3/17/2019

Order Number 0096961

1. Header | 2. Address | 3. Lines | 4. Totals | User tmuirhead

Order Date 3/17/2019 Order Type Drop Ship Order Status New Tax Detail...

Vendor No. 00-DENSO DENSO NORTH AMERICA

Taxable Purchases	.00	Last Receipt Number	
Nontaxable Purchases	454,554.00	Last Receipt Date	
Freight Amount		Last Invoice Number	
Sales Tax Amount	.00	Last Invoice Date	
Order Total	454,554.00	Completed Date	
Less Prepaid Amount	.00	Invoiced to Date	.00
Prepaid Check Number			
Order Balance	454,554.00		

Quick Print... Entry Currency USD Accept Cancel Delete

9 Go to the Totals tab.

10 To print the purchase order, click Quick print on the bottom left of the window.

Sage 100 ERP

Do you want to save changes?

Yes No Cancel

11 Click Yes to save changes.

Purchase Order Printing

Form Code STANDARD Currency.. Designer..

Description Preprinted Laser

Number of Copies 1 Collated Multi-Part Form Enabled Multi Part...

Print Comments Partial Print Extended Item Description

Line 1 Message
Line 2 Message

HP5D26EB (HP Officejet Pro 8620)#:5 Alignment **Print** Preview Setup

12 Click print to print a hard copy of the purchase order or click preview to save and email a digital copy.

Sage * Purchase Order Entry (TTT) 3/17/2019

Order Number 0096961

1. Header | 2. Address | 3. Lines | 4. Totals | User tmuirhead

Order Date 3/17/2019 Order Type Drop Ship Order Status New

Vendor No. 00-DENSO DENSO NORTH AMERICA

Taxable Purchases	.00	Last Receipt Number	
Nontaxable Purchases	454,554.00	Last Receipt Date	
Freight Amount		Last Invoice Number	
Sales Tax Amount	.00	Last Invoice Date	
Order Total	454,554.00	Completed Date	
Less Prepaid Amount	.00	Invoiced to Date	.00
Prepaid Check Number			
Order Balance	454,554.00		

Quick Print... Entry Currency USD Accept Cancel Delete

13 Click Accept to close the Purchase Order window.

Items that will need pricing changed manually:

PERCENTAGE OFF LIST PRICE RETAIL GUIDELINE

CROSBY ITEMS

Low Volume Customers - 15% Off Crosby List Price

Mid Volume Customers - 20% Off Crosby List Price

High Volume Customers - 25% Off Crosby List Price

SAWYER MFG ITEMS

Low Volume Customers - 5% Off Sawyer List Price

Mid/High Volume Customers - 10% Off Sawyer List Price

PIPELINE INSPECTION (SPY)

Low Volume Customers - 5% Off SPY List Price

Mid/High Volume Customers - 10% Off SPY List Price

MATHEY DEARMAN BEVELING ITEMS

Low Volume Customers - 15% Off Mathey List Price

Mid Volume Customers - 20% Off Mathey List Price

High Volume Customers - 25% Off Mathey List Price

GENERAL MFG CLAMPS

Low Volume Customers - 5% Off General MFG List Price

Mid/High Volume Customers - 10% Off General MFG List Price

KC MANUFACTURING - RATCHET CLAMP

Low Volume Customers - 5% Off KC List Price

Mid/High Volume Customers - 10% Off KC List Price