



Sales Orders



* Sales Order Entry (TTT) 3/16/2019

Order Number: S414886

Order Date: 3/16/2019

Order Type: Standard Order

Customer No.: CROSS01

Cust PO: TBD

Job Number: P100011

Ship To Addr: WC06 CROSSFIRE LLC

Terms Code: 60 60 days

Ship Via: WC/WHSE006 FOB ORIGIN

Confirm To: ACCOUNTS PAYABLE

E-mail: ap@crossfire-llc.com; emily.mccleney@crossfire-llc

Telephone No: (123)456-7890

Salesperson: 0023 Randy McKinley

Status: New Reason

Whse: 006 Pecos TX

Sales Tax Schedule: AVATAX

AvaTax Schedule

Quick Print Without Displaying Printing Window

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

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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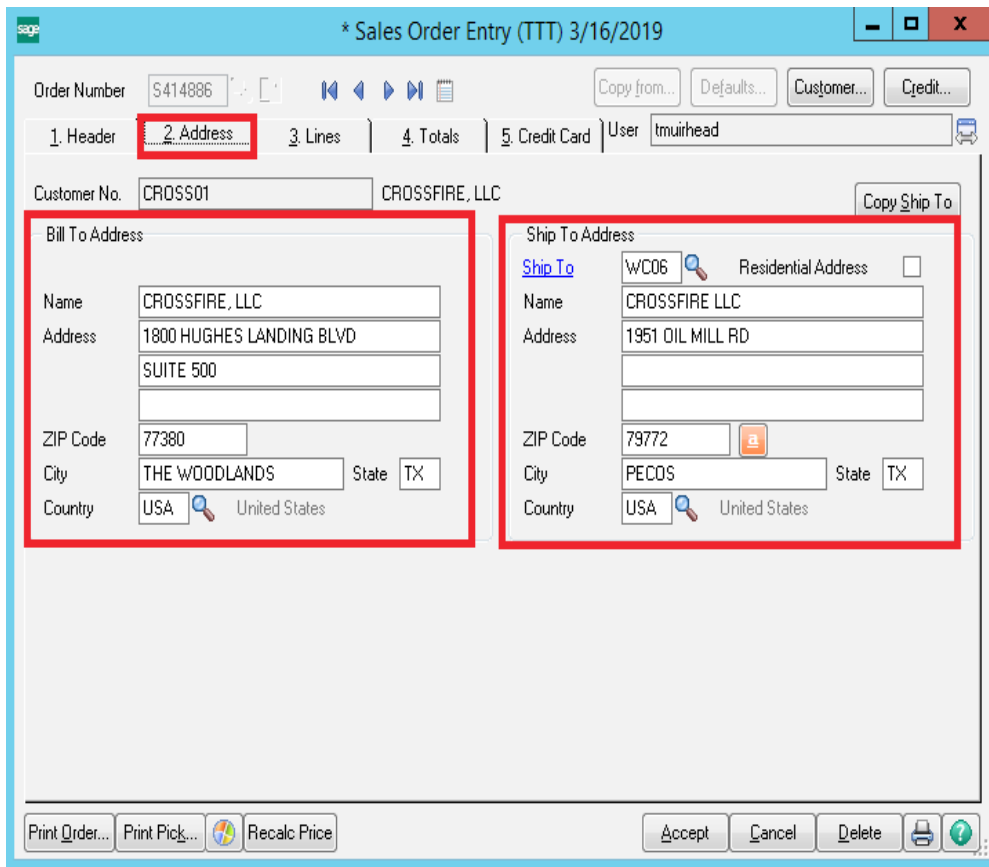
Quick Print Without Displaying Printing Window

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


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.

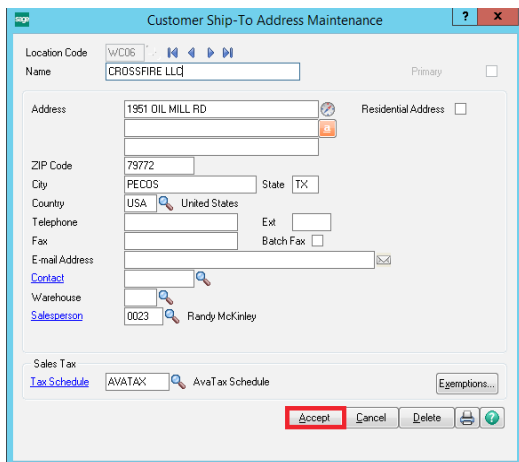
6 Enter the contact name in the confirm to, the contact’s telephone number, and salesperson number.



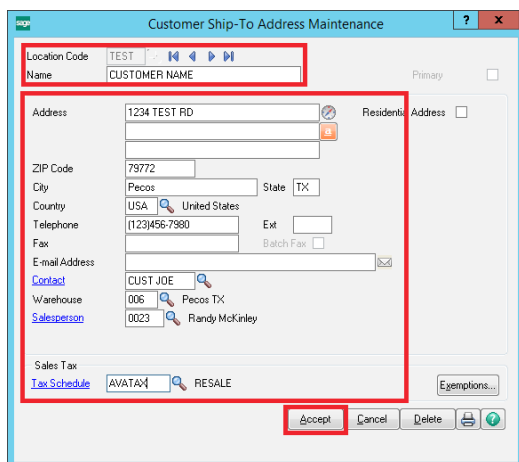
7 On the Address tab the Bill To will autopopulate from the customer's info in the system.

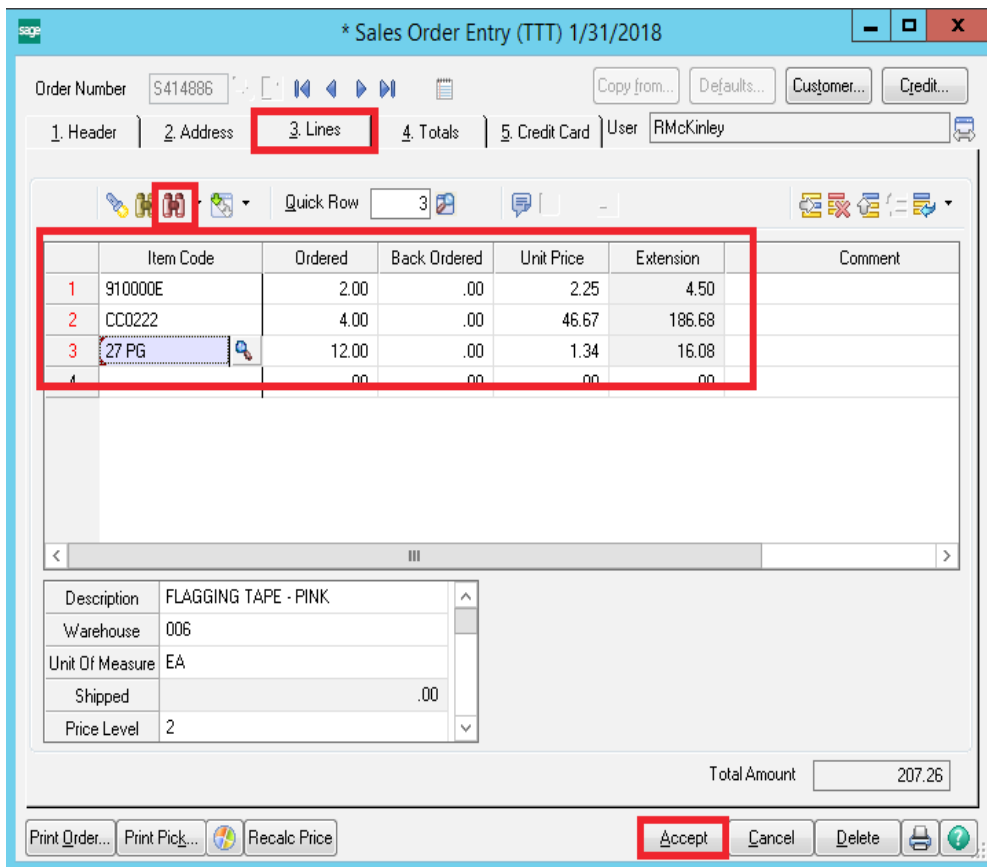
8 Enter the Ship To Address and verify it's a good address by selecting the Avatax key which looks like this: 

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

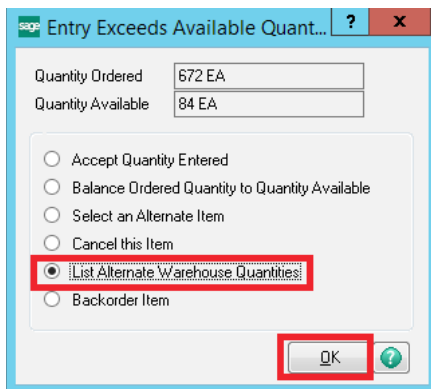


★ If the customer has a new address they're using frequently, create a new ship to by clicking the blue words "Ship To". Click accept on the window to create a new ship to. Type in caps a 4 letter description for the new location, the name, a good address, the warehouse for the location, salesperson, contact name and number, and make sure the tax schedule says AVATAX. Then click accept to save.



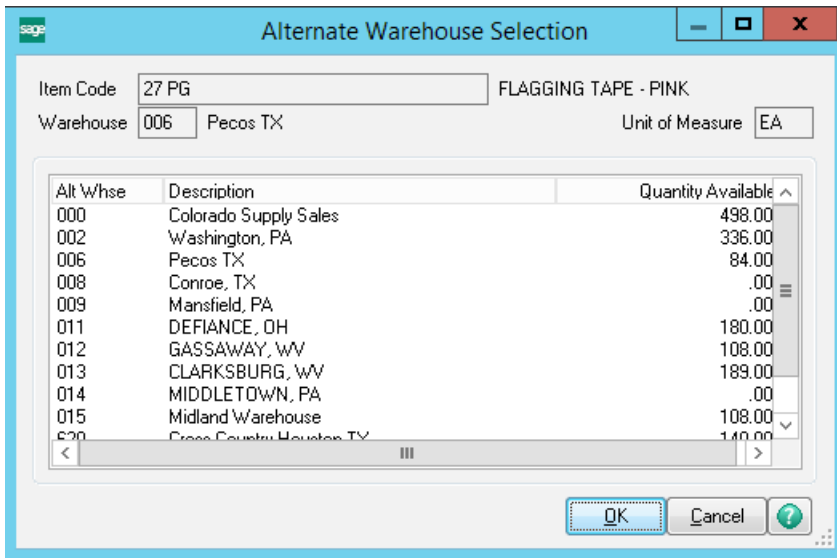


9 On the lines tab, enter the Item Code, Quantity Ordered, and the unit price. Unit pricing should come from the salesman, or the customer's purchase history. To look back at the purchase history, click the red binoculars above the Item Code column. If the item is from Crosby, Sawyer, SPY, Mathey Dearman, General MFG Clamps, or KC Manufacturing, see the end of this document to figure out the percentage off list pricing.



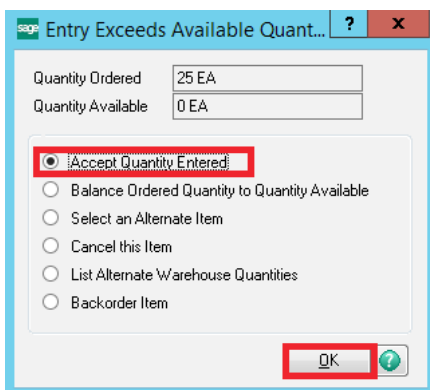
10 The extension should automatically populate based off of the quantity ordered times the unit price.

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:

The screenshot shows the Sage Sales Order Entry interface for a purchase order. The window title is '* Sales Order Entry (TTT) 3/16/2019'. The order number is S414886. The interface includes a navigation bar with tabs for Header, Address, Lines, Totals, and Credit Card. The 'Lines' tab is active, showing a table with columns: Item Code, Ordered, DS, Back Ordered, Unit Price, Extension, and Comment. The first line (Item Code 33-735S) has an 'Ordered' value of 25.00, a checked 'DS' checkbox, and a 'Back Ordered' value of .00. The 'Extension' for this line is 621.25. Below the table, there is a section for Warehouse (006), Unit Of Measure (EA), Shipped (.00), and Price Level (2). The Total Amount is 621.25. At the bottom, there are buttons for Print Order, Print Pick, Recalc Price, Accept, Cancel, and Delete.

| Item Code | Ordered | DS | Back Ordered | Unit Price | Extension | Comment |
|-----------|---------|-------------------------------------|--------------|------------|-----------|---------|
| 1 33-735S | 25.00 | <input checked="" type="checkbox"/> | .00 | 24.85 | 621.25 | |
| 2 | .00 | <input type="checkbox"/> | .00 | .00 | .00 | |

Warehouse: 006
Unit Of Measure: EA
Shipped: .00
Price Level: 2

Total Amount: 621.25

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 the warehouse team as well as any warehouse(s) other items may be shipping from.

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.

* 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: W09/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

Schedule: AVATAX

AvaTax Schedule:

Invoice Ready: YES

*printed

Quick Print Without Displaying Printing Window

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

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".

★ 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.

17 Click accept on the bottom right to close the sales 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 tabs for '1. Header', '2. Address', '3. Lines', and '4. Totals'. The 'Header' tab is active, showing various fields for entering purchase order information. Red boxes highlight several key areas: the Order Number field (0096961), the Date field (3/17/2019), the Type dropdown (Drop Ship), the Sales Order field (S414886), the Vendor No. field (00-DENSO), the Ship-To Address field (W/C06 CROSSFIRE LLC), the Terms Code field (01 Net 30), the Ship Via field (WCAWHSE006 FOB ORIGIN), the Warehouse field (006 Pecos TX), the Fax field (281) 821-0304, the Batch Fax checkbox, the Credit Card? dropdown (NO), and the Comment field (SEND TO CUSTOMER SO# S414886). The window also features a 'Quick Print...' button, an 'Entry Currency' field (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 field 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

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... Accept Cancel Delete

Entry Currency USD

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

Description Preprinted Laser

Number of Copies 1 Collated Multi-Part Form Enabled

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