

CREATE CUSTOMER ORDER – OPTION 400

Once inventory items and stock quantities have been entered into the system, you can add, modify, fulfill and ship customer orders. The general customer accounts (#99 House account or #001 Point of Sale account) created when you set up the company or a specific customer account can be used.

There are four ways to add orders into Conveyorware:

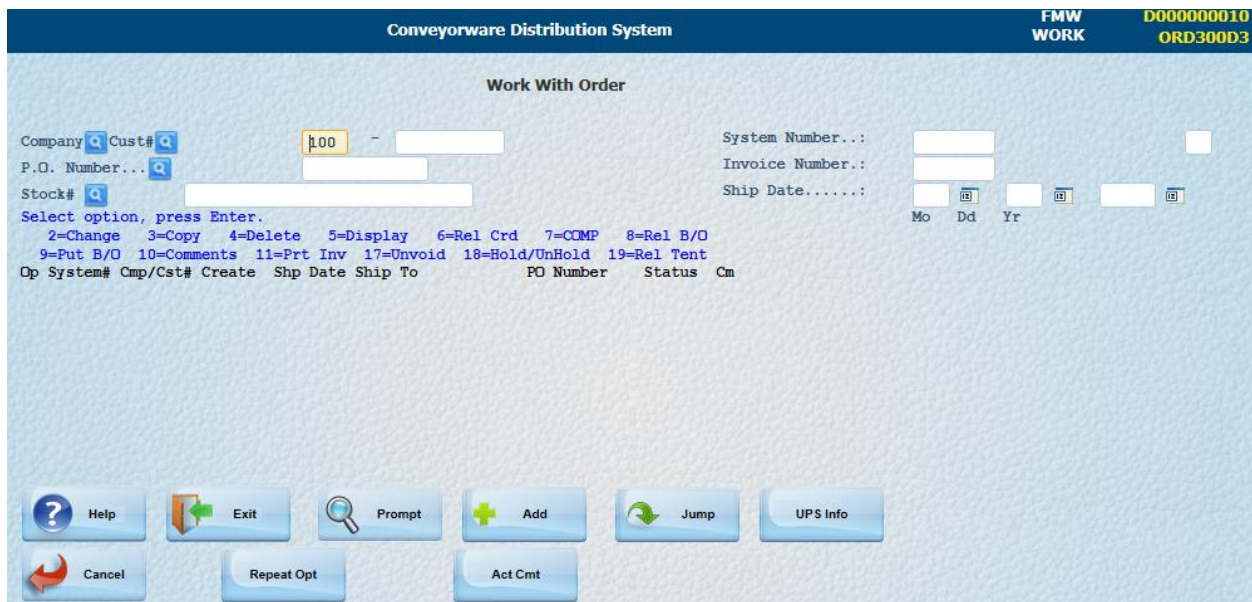
1. API – Your IT professional will review our API (found on the support page of the website) and program an order source (website, web store, other electronic form) into Conveyorware.
2. FTP – You will produce an output file from an order source (website, web store, other electronic form) and Conveyorware IT staff will map the orders into Conveyorware.
3. JAVA – Manually enter orders directly into Conveyorware using the Order Management option.
4. WEB ACCESS – Manually enter orders directly into Conveyorware as follows:

Select 1. Main Menu.

400. Orders, Fulfillment & Shipping

401. Work with Orders

➔ Verify or enter the company number **and** the customer number.



If you do not know the customer number put the cursor in the customer number box and select **[Prompt]**. The Customer Account Selection box appears. Type any letter in the customer number box.

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Customer Account Selection

Pos.to Cmp/Cust: 112 A X

Options: 1=Select
Op Customer Name Cust.Acct# Phone# Current A/R State

Exit Selections Detail Cancel Help

Customer Account Selection

Pos.to Cmp/Cust: 101

Options: 1=Select
Op Customer Name Cust.Acct# Phone# Current A/R State

BRUDERICK INDUSTRIES	101-0000000100	.00	MI
DRESS FOR SUCCESS	101-0000000099	.00	MI
MOM	101-0000000102	.00	MI
POS CUSTOMER	101-0000000001	.00	MI
SCIPVILLE SWAG	101-0000000101	.00	MI

Exit Selections Detail Cancel Help

➔ Select the correct customer and select **[Add]** to add a new order.

Conveyorware Distribution System FMW ADD CONVEYOR ORD305D3

Add An Order

Order Wtr: S DEBRA KINGSBURY Company/Cust.Nbr 112 - 114 S PRINT PCKLST
O ASDLFAKOD H YOU WILL BE PROMPTED H TO TYPE ADDRESS LATER
L ASDLFEKJA, MI I OR APPLY F13 (SHIFT+F1)
D ASDLFEKJA, MI 12344 P NOW P 00000

wh ShpTr Terms P.O.# Ter# Sls# PkgTyp ShpVia Shp Date Pp Nm/Am
1 PREPAY PREPAY 1 1 PACKAG 11052013 .00
Res Code *PREPAY ACCT

Seq#	Qty	Stock #	Price	B/D	C/Pct	Line Total
0001			.00			.00
0002			.00			.00
0003			.00			.00
0004			.00			.00
0005			.00			.00
0006			.00			.00
0007			.00			.00
0008			.00			.00

Help Override Exit Prompt Refresh Jump Del_Ord
Add_Cmts. F11=Dup_Order Cancel Adrs/Remk More keys

The **Add An Order** screen appears with the default information from the **201 Customer Record**.

The ship date can stay as the default date or a future ship date can be entered. If future ship date is chosen, the order/pick ticket will print on the future date entered. Future ship dates are good for recurring orders as they all can be entered at one time.

- ➔ Verify all completed fields.
- ➔ Complete all the mandatory information in the pink fields.
 - PO# is a unique identifier for this order. If there is no PO# insert the date or other identifying number.
 - Shp/Via is a very important field. There are four shipping methods:
 - Freight (trucking companies)
 - Parcel (UPS, Federal Express, USPS)
 - Customer Pick-up (CPU)
 - BILL (Just creates an invoice. Does not verify inventory)

Freight, Parcel and CPU require shipping through Conveyorware using Option 988 in the Fulfillment and Shipping menu.

Freight and CPU require a Bill of Lading be processed using Option 336 in the Inventory menu under Option 335.

BILL is a Quick Completion that does NOT verify inventory items per order.

More information regarding shipping orders is available in “Order Processing/Shipping” section.


Complete the quantity and stock number fields using the tab key or mouse. (The item price will populate automatically later if a retail price was noted in the inventory file.) **DO NOT [ENTER]** until all items have been recorded. **[Prompt]** can again be used to find a stock number just as it was to find a customer number except a *number* must be used instead of a letter.

Backorder (B/O) numbers can be input manually in the B/O column if there is not enough stock to fill this order. This will override the “default” to ship completed orders only. However, these backorder orders will need to be **manually released** once product is available. (Also see Backorder Inventory section.)

If a different **Commission %** applies to this order, it can be adjusted in the “C/Pct” column.

BE SURE TO INCLUDE A LINE FOR FREIGHT CHARGES AND THE AMOUNT AND, IF THE SYSTEM HAS NOT BEEN SET TO CALCULATE SALES TAX (in the original Company Set-up and/or Customer menu), INCLUDE A LINE FOR SALES TAX AND THE AMOUNT. BE SURE TO INPUT THE QUANTITY AS 1 FOR EACH.

Note: If you prefer to see your **order total** and not individual line totals, select **[F17]**.

➤ **REMEMBER:** A date can be used as a PO# and **[F4=Prompt]** can be used in any field with a 

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When all products for the order have been keyed in, **[Enter]**. The Ship-to Information Panel will appear.

SHIP-TO INFORMATION PANEL ADD

Name:

Company:

Street address:

City:

State/Province Abbr:

Country Abbrev:

ZIP Code:

Email:

Phone: (Numbers only)

Tax Authority:

If you are not using a company customer account (i.e. 99 or 1) the shipping information for this order will default to the customer shipping address previously provided. **[Enter]** for the “Remarks” screen.

Order On Credit Hold

Include Frt Charge On Inv (Y/N): (Parcel Shipments Only)

REMARKS

System Number.....: 280

Invoice Subtotal...: 60.00

Sales Tax.....: 3.60 <-Not all items Taxable

Invoice Total.....: 63.60 Check Item/Class

Order Taxable (Y/N): Tax Exempt#:

Cancel Date...:

Truck ID.....: Bill Lading:

Cust PO#

Override Qty/Pack (Y/N):

Back Order Short Items (Y/N):

This screen shows the **system number** for this order and the **invoice total**. All other fields are optional. **[Help]** can be used to determine if you need to complete the other fields. Information you want to appear on the invoice can be inserted in the Remarks area here, i.e. “Thank you for your order”.

➔ **[Enter]** twice to view this customer’s order history.

DEFAULT ORDER

A Default Order template can be created for repeat orders or for orders in which pricing has been changed for a specific customer.

Select **419 Work with Default Orders**

- ➔ Select the Company and Customer
Do not **[Enter]**
- ➔ Select **[Add Cust]**
- ➔ Insert Default Order Information **[Enter]**
Template will refresh. **[Cancel]**

Changes to Default Orders can be made in the drop down box, line **#5 Line Item**.

This is only a template holding special information for this customer. When an order for this customer is created, this information will automatically populate the order form.

BACKORDER INVENTORY

The system is defaulted **NOT** to ship an order until all items are available. However, if B/O items have not already been identified in the **Add an Order** screen, you still have the opportunity to override the default in the “Order **Remarks**” screen shown above.

Input Y (yes) in the **Back Order Short Items** field. The order will ship incomplete noting the items on backorder. Once the items are available, the system will automatically create a new order.

REVIEW/CHANGE AN ORDER

Select menu item **401 Work with Orders**

- ➔ Locate the correct order by entering the customer number and **[Enter]**. A list of orders for that customer will appear. Select the **system number** and the appropriate prompt.

Op	System#	Cmp/Cst#	Create	Ship Date	Ship To	PO Number	Status	Cn
	206	112-102	5/21/13	5/21/13	KERI SCIPIONE	05212013	ACT-WHSE	
	219	112-102	6/06/13	6/07/13	KERI SCIPIONE	06062013	CRD-PCKL	
	255	112-102	8/20/13	8/20/13	KERI SCIPIONE	255	CRD-PCKL	

Note: If you know the system order number, you can use it to go directly to the order.

- ➔ Select the correct order
- ➔ In the drop-down box select the required action.

If the customer's order needs to be changed,

- ➔ Make appropriate changes and [Enter].

DISPLAY ALL ORDERS BY COMPANY

Select **401 Work with Orders**

- ➔ Insert Company Number; [Tab to PO field]
- ➔ Insert "A" in Purchase Order field; [Enter]

DISPLAY ALL ORDERS BY CUSTOMER

Select **401 Work with Orders**

- ➔ Insert Company Number and Customer Number; [Enter]