ACTIVANT®

Managing Created Orders

Release 8.6.5 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

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Sales Management Overview

Use Eclipse to manage every aspect of a sale, from the moment it is quoted until the day it is invoiced.

Flexible Searching

Look up customers, vendors, transactions, and products by virtually any identifier.

- Find customers and vendors by any part of a company name, phone number, or keyword.
- Find transactions by order number, product, customer PO number, or shipping address.
- Find products by UPC number, product description, size, color, or manufacturer.

Numerous Product Entry Options

When entering products on sales orders, change your screen view to see any number of details about order items. Create non-stocks, access substitute and add-on products, or add recently ordered products to the current order. Robust product and pricing information are a keystroke away. Real-time inventory accuracy helps order writers fulfill inventory commitments, increasing customer satisfaction.

Bid Management

Use bid management features to create and copy bids, subtotal and reprice bid items, and convert bids into orders. Follow up on bids by creating bid reminders and reviewing bids that have not been converted into orders.

Management of Everyday Events

Use the system to handle everyday occurrences, like credit denials, product returns, credit and rebill transactions, and warranty tracking. Use reporting options to track trends in these areas, and reprint needed documents at will.

Quick Access to Related Features

Hot keys throughout order entry provide instant access to product features, discounts, shipment history, pricing information, and accounts receivable balances. You can schedule blanket orders, conduct credit checks, review order commitments, and check inventory availability at other locations.

Payment and Credit Management

Review invoices or orders before sending them to your customers, print consolidated invoices, and review invoices that match the criteria you specify. Monitor a customer's credit status at every stage of the order, and establish credit, past-due, and per-order limits as you like.

Operational Excellence

Use management tools to examine sales trends and to list orders that meet the criteria you specify. Uncover issues that impact profitability, view changes to orders, track sales sources, and more effectively manage your sales force.

Searching for Sales Orders

If you know basic details about an order, you can use the Search screen in Sales Order Entry to locate it.

> **Note**: If your company is using Solar Eclipse and running Eclipse Forms, you can create snapshots of your orders. For information about purchasing Solar Eclipse licenses or running Eclipse Forms for your company, please contact your inside salesperson.

To search for a sales order:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. In the **PrcBr** field, if accessible, type the number that identifies the branch that receives credit for the order.
3. In the **Ship To** field, enter all or part of the customer's name to do one of the following:

If...	Then...
the order selection screen displays	continue with the next step.
the Customer Primary Index list displays	select the customer from the list and press **Enter** to display the order selection list.

4. Select **Search** from the list and press **Enter** to display the Search screen.
5. Complete any of the following fields.

Field	Description
Order #	A letter **S** followed by a series of unique numbers that identifies the sales order.
Cust PO #	The number the customer has assigned to this order for tracking purposes. **Note:** If only non-alphanumeric characters are entered, duplicate POs are not recognized.
Ship Addr	The address to which to ship the requested items.
Product	A keyword or phrase that identifies a product on the order. Press **Enter** to display the Primary Product Index list and select the product.
Cust Rel#	The customer release number is a control code the customer assigns to an order for tracking purposes; for example, to identify a specific job or area within a branch. It is assigned in addition to the PO number.
Line Item Rel #	The line item release number is a control code the customer assigns to a product for tracking purposes. It is assigned in addition to the purchase order number.

> **Note:** If you enter field information that is not valid for the customer you selected, you cannot enter information in another field until you remove the invalid information. For example, if you enter **ABC123** in the **Cust PO #** field and no orders contain this purchase order number, you cannot enter

information in a different field until you remove the information from the **Cust PO #** field.

6. Use hot keys, as needed:

To...	Use this hot key...
include or exclude open orders in the search	**Orders** If an asterisk (*) is in the field, the system removes it. If an asterisk is not in the field, the system inserts one.
include or exclude bids in the search	**Bids** If an asterisk (*) is in the field, the system removes it. If an asterisk is not in the field, the system inserts one.
include or exclude invoiced orders in the search	**Invoices** If an asterisk (*) is in the field, the system removes it. If an asterisk is not in the field, the system inserts one.
show results for a selected branch	**Branch #** The cursor moves to the **Branch #** field. Enter a number that identifies the branch or enter ALL to search all branches.
show results for a selected date range	**Start Dt / End Date** The cursor moves to the **Start Dt** field. Use the **Start Dt** and **End Date** fields to specify the date range within which to search.

7. Press **Enter** to display orders that fit the criteria you selected.
8. From the selection list that displays, select the desired order and press **Enter**.

Editing Sales Order Details

After entering a sales order, you may need to review it or make changes to it. If the order is being picked or is now in a closed accounting period, the system may warn you about making changes, or prevent you from making changes altogether. If this happens, you can use the credit and rebill feature to make the necessary changes.

The following instructions describe how to locate an order and how to review or edit the order's details once you find it.

To locate an order:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. In the **PrcBr** field, if accessible, type the number that identifies the branch that receives credit for the order.
3. In the **Ship To** field, enter all or part of the customer's name to do one of the following:

   Note: If you entered the order recently, you can instead press **F10** and select the order from the quick access list.

If...	Then...
the order selection screen displays	continue with the next step.
the Customer Primary Index list displays	select the customer from the list and press **Enter** to display the order selection list.

4. Do one of the following things to locate the order:

To...	Select...
enter criteria to search for the order	**Search**
display a list of recent bids	**Bids** Select a bid from the list.
display a list of recent orders that have been invoiced	**A/R Items** Select an A/R item from the list.
display an open order	an order from the list. If the customer gave you a purchase order number, it displays next to the ship date. The system uses **-Dir** after the sales order number to identify direct shipment orders.

   Note: When entering customers with large numbers of transactions, a similar Fast Select Options screen displays instead. You can select any of the following options from this screen: **New**, **Open Items**, **Search**, **Lot Bids**, **Bids**, or **A/R Items**.

5. Press **Enter** to display the order on the Sales Order Entry Body screen.

To review or edit sales order details:

1. Open the order.
2. Review or edit the following fields, as needed:

   Note: Some fields are view-only.

Field	Description
Bill To	The address to which to send invoices. You can edit this information only in Customer Maintenance.
Ship To	The address to which to ship the products. You can edit this information on the Sales Order Entry Header screen.
Qty/Unit	The amount of the item to sell, and its proportions as it is packaged for sale, such as 1 each (ea), 1 box (bx), or 1 case (cs).
Product Description	A statement that identifies the item to sell. You can change to a different product or enter a more meaningful replacement description. **Note:** When adding products to an order, the system can be set up to re-check product availability and customer credit if an invoice or ship ticket has already printed.
Order #	A letter **S** followed by a series of unique numbers that identifies the sales order.
Stat	The current status of the order. You can edit this field on the Sales Order Entry Status screen.
PrcBr	A number that identifies the branch where the sales order was written.
ShpBr	A number that identifies the branch from which the order will ship to the customer. You can edit this information on the Scheduling screen.
ReqrDate	The date by which the customer must receive the order. You can edit this information on the Sales Order Entry Status screen.
ShipDate	The date the order is scheduled to ship to the customer. You can edit this information on the Ship Dates screen.

   Note: When an item is deleted from a sales order and that item is currently on an open purchase order, you can set up the **Notify Buyer When Canceled Item Is On An Open Purchase Order** control maintenance record to notify the writer of the purchase order via a tracker.

3. Change the screen view to review or edit other order information, as needed.

   Note: Some column views require authorization to view.

4. If you need to make changes on the order's Header screen, use the **Header** hot key.

   Note: Only some Header screen fields can be changed when an order is in a closed accounting period. With proper authorization, the following fields *can* be changed: Shipping Instructions, Internal Notes, Ordered By, Phone Number, Customer P/O #, Customer Rel #, and Batch ID. For more information, see Setup Requirements for Sales Order Header Information.

5. Use hot keys, as needed, to edit other information.
6. Press **Esc** to display the Sales Order Entry Status screen and change shipping details, as needed.

Changing the Status on Sales Orders

The Status screen details when and how various shipments leave your warehouse. For each order generation, you specify an order status specific to the products on that generation.

This screen displays automatically after you press **Esc** to save the Body screen information. If any Header screen information is required, you must also enter and save that before the Status screen displays.

> **Note:** When a sales order status is changed to Invoice, the order is removed from the Open Order Status Review Queue.

As an order moves through the system, there may be cause to change the status based on what is happening. For example, an order is opened as a Call When Specified, but the customer is in the area on business and can pick up with inventory. The status changes to Pickup Now.

You must be assigned the SOE.OPEN.ORDER.EDIT authorization key to change the order status.

To change the status on a sales order:

1. Locate the order for which you need to change the status.
2. Press **Esc** to display the Status screen.
3. In the **Order Status** field, press **F10** and select the order status you want to use.
4. Complete any additional fields that require entry. For example, if you select Ship On, you are required to enter a date in the **ShipDate** field.
5. Press **Esc** to save your changes and exit the screen.

Editing Vendor Direct Shipments

You can edit the sales order for a direct shipment, even after you pay the vendor. This lets companies that promptly pay vendors make later adjustments to sales orders. For example, you may need to edit the sales amount or tax exempt information.

You are prompted when opening a direct order that has been paid or is in a closed accounting period. You must be authorized to continue past the prompt. You can edit customer pricing and other information, but you cannot edit anything that affects COGS or Cost. This topic lists the field information you can edit.

> **Note:** If you change a direct order that contains return items on it into a regular sales order, the system prompts you to review and change the return type for those items.

To edit a vendor direct shipment:

1. Open a vendor direct sales order for editing and display the order's Body screen.
2. Edit any of the following:
   - Customer pricing information, which does not affect COGS or Cost. For example, change a list price, unit price, or net price.
   - Subtotals, which only affects customer pricing (not COGS or Cost).
   - Order comments, including replacement product descriptions.
   - Detail Lot Selection information (with a detail lot selected, use **Sched** hot key, then **Det Lot** hot key). You cannot edit anything affecting COGS or Cost.
3. Use the **Header** hot key to display the Header screen, and then edit any of the following:
   - **Ship To** field information, including the ship-to customer.
   - **Customer P/O #** or **Customer Rel #** fields.
   - **Phone Number** field.
   - **Payment Terms** field.
   - **Tax Exempt ID #** field.
   - **Picked By** or **Written by** fields.
   - **Out Salesperson** or **In Salesperson** fields.
   - **Shipping Instructions** or **Internal Notes** fields.
   - Any field on the Additional Header Information screen.
   - Salesperson Split Commission Percentage screen information.
4. Press **Esc** to close the Header screen, and return to the Body screen. Use the **Totals** hot key to display the Totals screen, and then edit either of the following:

- **Sales Tax** field.
- Payment information.

5. Press **Esc** to close the Totals screen, and return to the Body screen. Press **Esc** again to display the Status screen, and then edit either of the following:
   - **Prt** field for this generation. Use to change the print status.
   - **Ship Via** field.
6. When you finish editing, press **Esc** to close the Status screen and the order.

Changing Orders from One Type to Another

Within Sales Order Entry, you can change some types of orders into other types of orders. For example, you might need to change a sales order into a purchase order bid, or an order into a transfer order.

The following are some common options for working with different order types:

- Creating Purchase Order Bids from Sales Orders
- Creating Transfer Orders from Sales Orders

Creating Purchase Order Bids from Sales Orders

Within Sales Order Entry, you can create a purchase order bid from an existing sales order.

To create a purchase order bid from a sales order:

1. Open the sales order from which to copy the bid and display the order's Body screen.
2. Use the **Mode** hot key to display a list of options.
3. Select **Copy to Purchase Order Bid** and press **Enter** to display the Copy To Purchase Order Bid screen.
4. In the **Enter Price Branch** field, enter a number that identifies the branch from which the bid is entered.
5. In the **Enter Ship Branch** field, if accessible, enter the branch from which the order will ship to the customer. If the selected branch has insufficient inventory to complete the order, you can ship inventory from one or more of your other branches.
6. Leave the **Ship-From Same Ven? (Y/N)** field blank. This option is not possible available when creating purchase order bids from other types of orders.
7. If you selected **N** in the **Ship-From Same Ven? (Y/N)** field, in the **Ship-From Vendor** field, enter the name of the individual or company that will provide the materials.
8. In the **Gens to Copy** field, identify which order generations to copy to the bid. Valid values include: **All**, **Current**, or **Open**.
9. Leave the **Copy Current Pricing? (Y/N)** field blank. This option is not available when creating purchase order bids from other types of orders.
10. If prompted, specify whether to copy all open and closed order generations.
11. If prompted, specify how to handle the bid's COGS (cost of goods sold):
    - **Recost All Items**
    - Keep Manual Overrides
    - Keep All Costs/Overrides
12. Use the **Begin** hot key to create the bid and display the Purchase Order Entry Body screen.
13. Enter or edit purchase order information, as needed, and continue processing the sales order.

Order Consolidation Overview

Use the Order Consolidating Queue to combine open sales orders for the same ship-to customer. Consolidating orders allows you to take advantage of order-handling efficiencies; such as picking, packaging, and billing everything at one time. It may also save the customer freight and handling charges.

This queue lets you quickly select an order to consolidate to, and one or more orders to consolidate from. You can drill down to preview the orders before consolidating them. This lets you ensure that the correct orders are selected.

Once consolidated, the *from* orders are automatically cancelled. The branch inventory commitments, freight amounts, cash payments, and line item comments on *from* orders automatically carry over to the consolidated order. Available discounts and taxes are recalculated on the consolidated order, and its shipping information is used.

When you open a consolidated order, the line items that were added to it have comments attached. These line item comments show the original order number and any purchase order number. For instance, each line item comment might include something like this: Consolidated from Order S1324157. PO# 0189.

> **Note:** Within Sales Order Entry, you can also consolidate the current sales order with another order to create a separate, new order. Or, merge items from another order onto the current order.

Consolidating Sales Orders

Use the Order Consolidating Queue to combine open sales orders for the same ship-to customer.

To consolidate orders:

1. From the **Orders > Queues** menu, select **Customer Calling Queue** to display the Customer Calling Queue screen.
2. In the **Brch** field, enter the desired branch. Or, select **all** to search for all branches.
3. In the **Type** field, enter the type of orders you want to review.
4. In the **Writer** field, enter the desired writer. Or, select **all** to search for all writers.
5. In the **End Dt** field, enter last ship date you want to review. The system will select items that match your criteria.
6. Use the **Consolidate** hot key to display the Order Consolidating Queue screen. This screen will list any open orders that can be consolidated.
7. Review the following fields, as needed:

Field	Description
Order #	The number for each order or order generation.
Sel	Use the Selection (Sel) field to specify which orders to consolidate, and how they are consolidated. Specify one order to consolidate to, and one or more orders to consolidate from. Leave this field blank to ignore an order during consolidation. To specify the orders for consolidation, position the cursor on the desired line. Enter a T to designate the "to" order (the order into which the other orders are consolidated). Enter an F for each order that you want to designate as a "from" order. **Note:** You cannot select an order that contains any tagged or procured items.
Shipdate	The shipping date for each order or order generation.
LineItems	The number of line items for each order or order generation.
Weight	The shipping weight (if available) for each order or order generation. For shipping weights to be available, a weight must be specified for the products in Product Maintenance.
Total $	The total dollar amount for each order or order generation.

8. Use hot keys, as needed.

To...	Use this hot key...
start the order consolidation	**Begin** The specified orders are consolidated, and you are returned to the Order Consolidating Queue screen.
view the selected order	**View** The sales order Body screen displays.

To...	Use this hot key...
select specific orders based on Branch, Order Writer, End Date, Inside Salesperson, Outside Salesperson, or Ship Via information	**Select** The Selection Criteria screen displays. Enter the criteria and press Esc to select only those orders.
select all of the orders in the consolidation queue	**Select All** An F (from) displays in the **Sel** column for each order. Change one order to T (to). This order will be used as the resulting consolidated order. **Note:** You can delete the F from any order you decide not to include.

Note: The Order Consolidating Queue is one of two methods you can use to consolidate orders in Eclipse. This method lets you quickly consolidate two or more complete orders. When you need more precise control over an order and its line items, use the Consolidate to New Order mode. This is accessed using the Mode hot key on a sales order's Body screen.

Consolidating the Current Sales Order With Another

Within Sales Order Entry, you can consolidate the current order with another order to create a separate, new order.

To consolidate the current sales order with another one:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Mode** hot key to display a list of options.
3. Select **Consolidate to New Order** and press **Enter** to display the Consolidate Current Order Gen To screen.
4. In the **Consolidate to Order#** field, enter the sales order with which you want to consolidate this one.
5. In the **Copy All Lines** field, enter **Y** to include all lines on the order or **N** to enter a range in the next two fields.
6. In the **Start Line** field, enter the number that identifies the first line on this order to consolidate with the selected order.
7. In the **End Line** field, enter the number that identifies the last line on this order to consolidate with the selected order.
8. In the Leave Items on Order field, enter **Y** to retain the current order, or **N** to cancel the items on the current order. If you are copying all lines, the entire order will be cancelled.
9. To verify that the selected order is the one you want to consolidate with the current order, use the **View** hot key to display the (view-only) Sales Order Entry Body and Status screens.
10. If you are satisfied with your selection, use the **Begin** key to display the Sales Order Entry Body screen and consolidate the orders. The line items that were added include a comment indicating their order source; for example, **Consolidated from Order S1324157**.
11. Continue processing the order.

Merging Items From Another Order to the Current Order

You can select one or more items from another order, and merge those items onto the current order. This is handy when a customer needs to repeat part of an order, for example. When you merge, you *copy* the items onto the current order, without altering the sales order you merge from. Once the items are merged, you can edit them as usual.

To merge items from another order:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Mode** hot key, and then select **Merge Items From An Order** to display a screen that asks what to merge from.
3. Enter the order number, or entity description or number, that you want to merge the items from, and then press **Esc**. The Line Item Selection screen displays.
4. Select the line items you want to include. To select a line item, position the cursor in the **S** (selection) field adjacent to the desired line item, then press the **Spacebar**. Press the **Spacebar** again to deselect a line item. An asterisk (*) indicates a line item is selected. You can also use one of the following hot keys:

To...	Use this hot key...
display the Item Select Criteria screen	**Select** Enter additional Price Line, Buy Line, Description, or Line# field criteria to select the products.
select all line items	**Select All**
deselect all line items	**Clear Select**

5. Press **Esc** when you are satisfied with your item selections.
6. Before merging the selected items onto your order, two screens ask you how to handle the merged products' costs, and then their prices. Specify the following, when prompted:
   - Whether to use the selected items' original COGS (cost of goods sold).
   - Whether to use the selected items' original prices. If you answer **N**, you are given the opportunity to enter a Cost Override Code, followed by a reason for change.

   Note: When order items are merged, lot items are not included.

Running the Open Sales Orders Report

Run the Open Sales Orders Report to see which orders remain unshipped (open). The report lists all the open orders that meet your selection criteria.

The report shows you the branch, order numbers, ship dates, customer names, and order amounts. You can also include information on costs, if desired. Grand totals display at the bottom of the report.

To report on open sales orders:

1. From the **Orders > Reports** menu, select **Open Sales Orders**.
2. In the **Br/Tr/All** field, enter the branch or territory for which you want to generate a report. Enter ALL to generate reports for all branches and territories.
3. In the **Start Date** and **End Date** fields, press **F10** and specify the desired calendar date range.
4. In the **Select Date** field, press **F10** and specify whether to select the open orders by their Ship Date or Order Date.
5. In the **Sort by** field, press **F10** and specify how to sort the report. For example, sort by Customer or by Writer.
6. If needed, use the **Customer** field to specify a customer. This limits the report to that customer.
7. If needed, use the **Writer** field to specify the salesperson writing the orders. This limits the report to that order writer. Press **F10** for list.
8. In the **Select By** field, indicate whether to run the report for price lines or for products. Based on your selection, the system names the next field accordingly. For example, if you enter Price Line in the **Select By** field, the next field is called **Price Line**.
9. In the **Price Line** or **Product** field, enter a price line or a product ID, as needed. To enter multiple values in this field, use the **Multi** hot key. When you press **Esc**, *Multi* displays in the field. To run the report for all values, leave this field blank.

   Note: The **Multi** hot key *only* works in conjunction with the **Select By** field and its corresponding **Price Line** and **Product** selections; it does not work with any other fields on this screen.

10. In the **Bids** field, press **F10** and specify whether to Exclude or Include bids, or Only report on bids.
11. In the **Select By** field, press **F10** and specify whether you want to select the report by Price Line or Product.
12. In the **Report Format** field, press **F10** and specify whether the report is for Internal or External use. An external report, which a customer might see, does not show cost information or gross margin dollars and percentages.

13. Set options, if needed, and generate the report.

    Note: If you have COGS.VIEW or COST.VIEW authorization, before printing you are prompted to specify which cost shows on the report. Specify Generic Cost (cost you want others to think you pay), Cost of Goods Sold, or None.

Reviewing the Status of Open Sales Orders

Warehouse workers use the Open Order Status Review Queue to verify which shipping tickets have printed. Sales personnel also use this queue to review the current status of orders. Accounting personnel use the queue to check which orders are on credit hold, but otherwise ready to print.

Use the **Remove Orders from the OOSRQ When Prt Status Changed To** control maintenance to remove orders from this queue when the print status has changed to a specific print status. If you cannot locate an order in this queue and you are unsure if the order is in a print status which may remove it from the queue, you can check this control maintenance record.

To review the status of open orders:

1. From the **Orders > Queues** menu, select **Open Order Status Review Queue**.
2. In the **Br** field, press **F10** and specify one or all branches whose orders you want to list.
3. In the **Sel Items** field, press **F10** and select **All** or the type of orders to list:
   - Select **Printed** to list orders that should have printed, but have not been confirmed using this queue.
   - Select **Credit** to list orders that did not print because of a credit hold. Selecting this option enables the adjacent **Crdt Mgr** field. If the **Display Credit Manager Column For Credit Items** control maintenance record is set to Yes, the **Credit Manager** column displays in the queue when you select this option. If it is set to **No**, the **Picker** column displays instead.
   - Select **Unavailable** to list orders that *should* ship, but cannot because products are unavailable. A sales manager or expediter should review these orders.
   - You can also select orders by an In-Process Status that your company has defined, such as PICKING, PACKING, or STAGING. These statuses are often used with radio-frequency (RF) barcode automation.
4. In the **PrcBr** field, press **F10** and specify one or all pricing branches whose orders you want to list.
5. If you used the **Sel Items** field to select **Credit** problem orders, you can limit the listing by using the **Crdt Mgr** field to specify a credit manager or a credit message group. Also, if a message group named "Credit" exists, it is automatically notified when an order with a Credit status displays in the queue.

   Note: In order to access the **Crdt Mgr** field, you must have previously selected **Credit** in the **Sel Items** field.

6. Review the column information listed below. Some columns vary, depending on how you have selected the orders you want to review.

Column	Displays...
Order#	order number.
Customer	customer name.
S	the order's status.
Date/Time	date and time the order's current status began.
Status	the order's current status within the system; for example, Printed, or an In-Process Status, such as PACKING.
Via	the order's current ship via.
Order Tot	total amount of order.
Picker	any order picker assigned.
Crdt Mgr	the credit manager assigned to the order.

7. Use hot keys, as needed:

To...	Use this hot key...
open the selected order for viewing	**View**
open the selected order for editing	**Edit**
confirm that the shipping ticket printed (removes order from the queue)	**Confirm Prt** **Note:** *Via Review* orders are treated the same as credit holds and are not removed from the queue. Do not use with RF.
release the hold on the order, so it can be printed	**Rel Hold** You must be authorized to release a credit hold. If releasing an Unavailable Product hold, you must be authorized to over-commit inventory. **Note:** You are prompted to change the ship date to the current date. Enter **Y** to change the date; enter **N** to leave the date as is. For more information, see How the System Prints Orders Released from Credit Hold.
clear the selected hold order from the queue	**Clr Hold** Unless the order is edited or circumstances change, the order reappears in the queue the next time.
reprint a lost or damaged shipping document	**Reprt** The Order Reprinting Options screen displays.
resort the order list (by ascending entry date and time, for example)	**Sort** **Note:** When sorting by Order Status, orders with a Pick Up Now status display first, and all other statuses display alphabetically.
print the queue listing	**Prt**

To...	Use this hot key...
find and move the cursor to the invoice you specify	**Find**
perform a credit override or deny credit	**Cred Override** Managers can do an A/R Inquiry, then release the selected order's credit hold by specifying a Credit Override Amount.
toggle your view between the **Picker** and **Crdt Mgr** (Credit Manager) columns	**Tgl View**

Checking Availability for All Sales Orders

Use the Check Availability for All Orders process to compare shipping dates against stock availability for all open sales orders. Running this process regularly helps keep the Customer Calling Queue up to date. Review your Customer Calling Queue frequently, so you can call your customers promptly.

This phantom process selects orders with an order status of:

- Call When Specified, if within the specified time frame.
- Call When Complete, if the product inventory is now available.
- Call When Available, if the product inventory is now available.

Similarly, the process selects the following *ship* status orders, if they have suitable inventory or dates:

- Ship When Complete
- Ship When Available
- Ship When Specified

Before printing the shipping tickets for the ship status orders, the process checks product availability and customer credit status. If there is a problem with either, the order status is changed to Call When Complete.

The Check Availability for All Orders process is routinely set up during installation, but you can reschedule the process as needed. This process is controlled using a standard Phantom Scheduler screen. For more information on the screen options, refer to the Phantom Scheduler topics.

To check availability for all orders:

1. From the **Orders** menu, select **Check Availability for All Orders**.
2. Enter a **Start Time** and **Start Date** for the process.
3. If desired, enter an **Expire Date**, after which the process is no longer rescheduled. Leave this field blank to continue rescheduling the process indefinitely.
4. Use the **Reschedule** fields to specify when the process should automatically repeat. For example, enable the **Daily** field to repeat the process every day.
5. If you want the process to run more than once a day, use the **Repeat** fields to specify how often the process is repeated.
6. When you are satisfied with your settings, press **Esc** to check availability.

Monitoring the Customer Calling Queue

Monitor the Customer Calling Queue to proactively track the sales orders that require calls to customers. The queue reminds you at the appropriate time about orders with a status of:

- Call When Available
- Call When Complete
- Call When Specified

Orders with a *call* status still commit the inventory, but do not print shipping tickets. Instead, these orders send reminders to the queue that action is needed.

In its default view, this queue has columns listing each order's Ship-To customer, phone number, order number, branch, purchase order number, ship via, and order amount.

To monitor the calling queue:

1. From the **Orders > Queues** menu, select **Customer Calling Queue**.
2. In the **Brch** field, press **F10** and specify a branch, territory, or ALL.
3. In the **Type** field, press **F10** and specify the category of orders to list. Note that the screen's columns and hot keys may change, depending on the type you specify.

Type	Restricts listings to...
New Items	orders with no entry (or with a suitable Next Call date entered), using the **Log Call** hot key.
Trouble	orders in trouble, where available dates have slipped.
Cancel	review open orders before returning them to bids, or cancelling. Use with the Order Return to Bid Parameter control maintenance record to catch dead orders that are committing inventory. First, run Check Availability for All Orders from the **Orders** menu.
Directs	orders shipped direct from vendors to customers.
Lot Items	orders with one or more lot item order generations.
Credit	open sales orders that are on credit hold.

4. Specify selection criteria in these optional fields, as desired:

Field	Restricts listings to...
Writer	an order writer.

Field	Restricts listings to...
End Dt	the orders' ship date. If blank, the system lists all orders that match the type specified in the **Type** field. **Note:** Orders for which a different next-call date has been entered, as described in step 6, will not display.
In Slsp	an inside salesperson.
Out Slsp	an outside salesperson.
Via	the orders' ship via type.
Credits	whether they include credits (negative items, such as returns). Press **F10** and specify whether to **Include**, **Exclude**, or **Only** list credits.
Directs	whether they include direct shipments. Press **F10** and specify whether to **Include**, **Exclude**, or **Only** list direct shipments. **Note:** This field only displays when you select **Trouble** in the **Type** column.

5. Once the list displays, use these hot keys as needed. Note that different hot keys or wording may display, depending on your selection in the **Type** field.

To...	Use this hot key...
open the selected order for viewing	**View**
open the selected order for editing	**Edit**
combine open sales orders for a customer	**Consolidate**
open the selected order's Header screen	**Header**
open the Detail Scheduling screen for the selected order	**Detail Scheduling**
change the selected trouble order's ShipDate to the Earliest date	**Adj Shipdt**
toggle the queue listing from ship date to required date	**View**
display items from the selected orders that are scheduled to ship	**View Items**
toggle the view from bill-to customer to ship-to customer	**Bill-To/Ship-To**

6. If desired, use the **Log Call** hot key to enter notes about a customer phone call, specify a next-call date, or set up a postcard reminder.
   - In the **Next Call** field, enter the date you want to place the next follow up call. The sales order will appear in the Call When Complete Queue on that date.
   - In the **Mail Card** field, specify whether you want the system to print a Customer Reminder postcard.
   - In the **Comment** field, enter any desired comments.
7. To remove an order from the queue, change its status. For instance, open and edit the order so that its status is **Ship When Specified** or **Pick Up Now**.

Sending Customers Calling Queue Data

Use the Customer Calling Queue to proactively track the sales orders that require calls to customers. This queue reminds you at the appropriate time about orders. However, you can use activity triggers for the Customer Calling Queue to send reports to your customers to remind them they have ordered items to pick up, or that their orders are still awaiting fulfillment from your vendor.

For example, you may have customers who want a report every Monday morning to tell them through e-mail what orders are available for pick up. On the other hand, you may have another customer who wants a fax every Friday morning to indicate what items are still waiting to be filled.

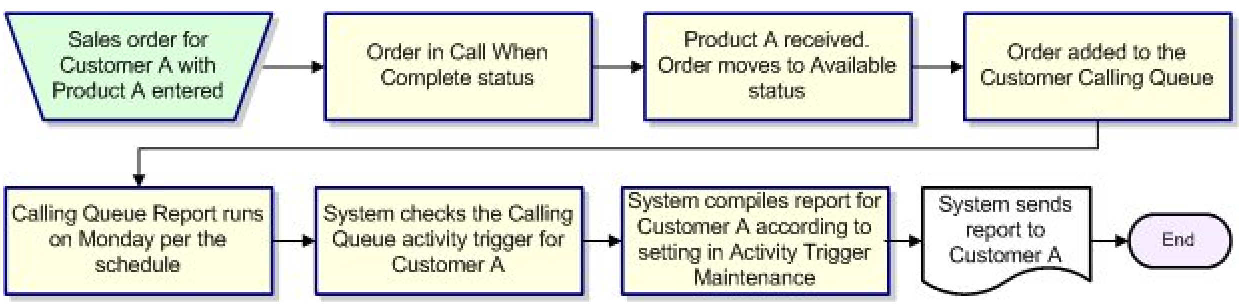
Before the system sends information to your customer, you must have the activity trigger ***and*** the report or reports set up for each customer that wants to receive a report. The system sends reports based on the selections in the activity triggers set up. For information on setting up the activity triggers, see Assigning Activity Triggers in Entity Maintenance.

The following examples show how the triggers, the queue, and the reports are connected and why they are interdependent.

Example 1: Single Customer

For this example, assume the following to be true:

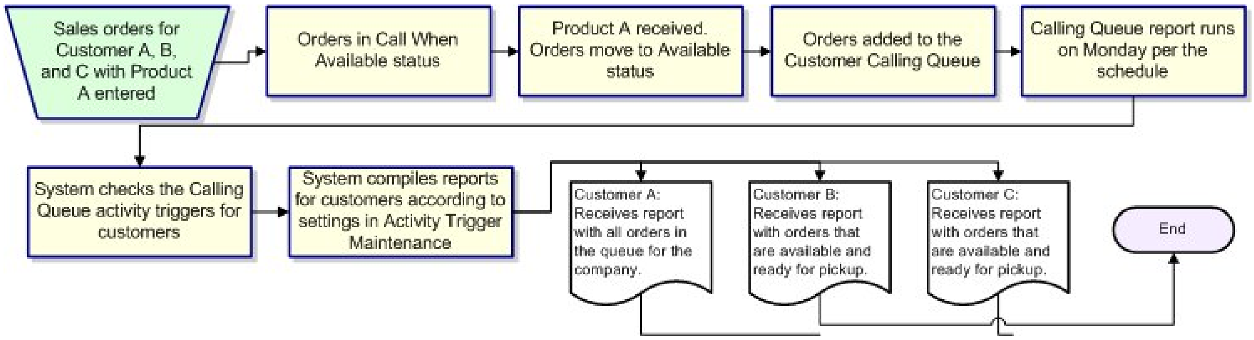
- Customer A has the Calling Queue – All Orders activity trigger set.
- Customer has their report scheduled to run on Monday morning.



Example 2: Three Customers

For this example, assume the following to be true:

- Customer A has the Calling Queue – All Orders activity trigger set.
- Customers B and C have the Calling Queue – Available Orders activity trigger set.
- All three customers have the reports set up to run on Monday morning.



Running the Calling Queue Reports with Activity Triggers

You can indicate how you want the report to run depending on your business needs. You can also choose to run the report for select customers which may be run more frequently for important customers. Use the activity trigger settings in conjunction with these report settings to ensure that your customers are getting the information they need.

To run the Customer Calling Queue - Available Orders Report:

1. From the **Orders > Reports > Customer Calling Queue** menu, select the **Customer Calling Queue - Available Orders** to display the Customer Calling Queue - Available Orders screen.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which to run the report.
3. In the **Customer Level** field, select one of the following levels: **Bill-To**, **Ship-To**, or **Parent**.
4. In the **Customer** field, enter the customer for which you want to run the report. To run for all customers, leave this field blank.
5. Set options, if needed, and generate the report.

To run the Customer Calling Queue - All Orders Report:

1. From the **Orders > Reports > Customer Calling Queue** menu, select the **Customer Calling Queue - All Orders** to display the Customer Calling Queue - Available Orders screen.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which to run the report.
3. In the **Customer Level** field, select one of the following levels: **Bill-To**, **Ship-To**, or **Parent**.
4. In the **Customer** field, enter the customer for which you want to run the report. To run for all customers, leave this field blank.
5. Set options, if needed, and generate the report.

To run the Customer Calling Queue Notification Report:

1. From the **Orders > Reports > Customer Calling Queue** menu, select the **Order In Calling Queue Notification** to display the Order In Calling Queue Notification Report screen.

   The system checks the trigger information for the customer. You must set up the trigger notifications from the activity triggers screen. This driver screen does not have settings to select.

2. Generate the report.

Running the Customer Calling Queue Report

Run the Customer Calling Queue Report to list orders that require telephone calls to customers.

The Customer Calling Queue tracks orders with a status of Call When Available, Call When Complete, or Call When Specified. Salespeople monitor the queue to see when newly-arrived products, or a specified date, indicate that their customers need a follow-up phone call.

Run the Customer Calling Queue report to select and report on specified items from the queue. The report categorizes order writers with their orders that are in trouble, or need followup. While you can filter the queue to view these items, the report allows you to schedule notification instead. For example, your manager may require that you send a list of all orders requiring follow-up each Thursday. You can schedule this report to run with the specified parameters and send it directly to your manager.

The report columns list the following things:

- Branch, writer, and customer.
- Order number, and customer P/O number.
- Order date and ship date.
- Net amount of each order, total for each order writer, and grand total.

To run the Customer Calling Queue report:

1. From the **Orders > Reports** menu, select **Customer Calling Queue**.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which to run the report.
3. In the **Writer** field, enter the user ID to run the report for one writer. Leave this field blank to select all order writers.
4. In the **Type** column, press **F10** and select which orders to include in the report. You can only select one type at a time:

Type	Specifies orders...
New	with call back dates before the current date or past due date. The report includes order date and ship date.
Trouble	in trouble, where available dates have passed. The report shows the completion date and ship date.
Cancel	requiring review before returning them to bids or cancelling. The report shows the order date and ship date.
Directs	shipped direct from vendors to your customers. The report shows the ship date and earliest expected date. **Note:** Direct lot items on the report are indicated by an **L**.

5. If you entered **Trouble** in the **Type** field the following fields display:
   - **Days in Trouble –** Specifies the minimum number of days in trouble. The report includes orders where the days between the required date and the ship date exceed this number.
   - **Req'd Date (Inc/Exc) –** Specifies whether to include or exclude each order's required date in the report.
6. In the **Ready Through** field, specify a date if you want to include orders scheduled to be ready on or before that date.
7. In the **Order Date Before** field, specify a date if you want to include orders that were ordered on or before that date.
8. In the **Days Between Dates >** field, enter a number if you want to include orders where the days between order date and ship date exceed this number.
9. In the **Orders/Credits/Both** field, press **F10** and indicate whether to include only orders, only credits (returns), or both.
10. Set options, if needed, and generate the report.

Running the Customer Expediting Report

Use the Customer Expediting Report to proactively monitor your biggest customers' open orders.

The report shows you which products are still backordered, as well as their expected availability. Once you determine the products and orders that need expediting, you can take action to get the products sooner.

For each item, the report always includes the items listed below. You can also set up other optional columns as needed.

- Required date
- Order number
- Product description
- Available date

To run the Customer Expediting report:

1. From the **Orders > Reports** menu, select **Customer Expediting** to open the Customer Expediting Report screen.
2. In the **Customer** field, specify the customer whose orders you want to list. You can use the **Multi** hot key to specify additional customers.

   Using the **Multi** hot key, you can also clear, save, or recall a list of customers. When the Customers Selection screen displays, you can:

   - Report on additional customers by entering each on a blank line.
   - Remove selected customer from list by pressing **Alt-Delete**.
   - Press **Esc** to close screen.
3. In the **Sort by** field, press **F10** and specify how to sort the report. Sort options include **Required Date** or **Customer PO**. Or, specify **Customer Part#** to sort by customer-specific part numbers.
4. If you want to change any report columns that display, or their widths, select the **Column** hot key. Available columns:
   - **Cust PO#–** Customer purchase order number.
   - **Cust Part#–** Customer part number.
   - **Qty/UM–** Quantity and unit of measure.
   - **Line Rel#–** Line item release number, if one exists.
   - **Ship Date–** Order ship date.
   - **Tag–** Tagged order, if one exists.
   - **Avail PO–** Purchase orders from which products will become available.

- **Order Date**– Order creation date.
- **P/O Transfer Date**– Transfer date for the purchase order.
- **P/O Transfer Writer**– User who entered the transfer order information.
- **P/O Transfer Cost**– Cost of transfer items.
- **Customer Release #**– Release number associated with the order.
- **Ordered By**– User who ordered the items at customer location.
- **Customer Phone Number**– Contact phone number for the customer.

5. Set options, if needed, and generate the report.

Monitoring the Trouble Queue

Use the Customer Calling Queue to improve your customer service by monitoring orders "in trouble." Orders in trouble are those whose available dates have slipped, perhaps because the vendors are now behind schedule filling purchase orders.

In its default view, the trouble queue has columns listing each order's ship-to customer, phone number, order number, branch, ship date, and earliest available date.

To monitor the trouble queue:

1. From the **Orders > Queues** menu, select **Customer Calling Queue**.
2. In the **Brch** field, press **F10** and specify a branch, territory, or ALL.
3. In the **Type** field, press **F10** and specify **Trouble** as the type of order to list.

   With **Trouble** as the criteria, the system lists all orders (regardless of the status code) where the **ShipDate** and the **Earliest** available date are no longer the same.
4. Specify selection criteria in these optional fields, as desired:

Field	Restricts listings to...
Writer	an order writer.
End Dt	the orders' ship date. We recommend using a future date, since orders that are in trouble as of today's date cannot be expedited.
In Slsp	an inside salesperson.
Out Slsp	an outside salesperson.
Via	the orders' ship via type.
Credits	whether they include credits (negative items, like returns). Press **F10** and specify whether to **Include**, **Exclude**, or **Only** list credits.
Directs	whether they include direct shipments. Press **F10** and specify whether to **Include**, **Exclude**, or **Only** list direct shipments.

5. When the **Days in Trouble** screen displays, enter **1**, or another number of days if needed. The number you enter specifies the minimum difference between an order's **ShipDate** and the **Earliest** available date.
6. Once the list displays, use these hot keys as needed:

To...	Use this hot key...
open the selected order for viewing	**View**
open the selected order for editing	**Edit**
open the selected order's Header screen	**Header**
open the Detail Scheduling screen for the selected order	**DetSched**
enter notes about a customer phone call	**LogCall**
change the selected order's ShipDate to match the Earliest date	**AdjShipdt**

To...	Use this hot key...
toggle the queue listing from ship date to required date	**ChngView**
view items on the selected order	**Item**
toggle the queue listing from bill-to to ship-to customer	**BT/ST**

Note: Once you have identified the orders in trouble, be proactive. Let your purchasing department know which orders need special procurements to meet deadlines. Or, you can make adjustments to less critical orders, so you can supply the more important ones. Finally, as the name of the screen suggests, call your customers. Let them know when orders are running late, or when you are taking extra steps to serve them.

Notifying Customers About Orders in Trouble

Orders in trouble are those whose available dates have slipped, perhaps because the vendors are now behind schedule filling orders. You can use the Customer Calling Queue to improve your customer service by monitoring any troubled orders waiting for products to fulfill the order.

You can also schedule a phantom process to automatically notify customers who have the Order in Trouble activity trigger assigned about orders they are waiting for that whose available dates have slipped. For more information about assigning the activity trigger, see Assigning Activity Triggers in the Entity Maintenance documentation.

After the system generates a notification for an order, it records the date and time that the notification was sent, and also records the new available date. Any subsequent checks only trigger a notification if the current ship date is different from the previous notification.

To notify customers about orders in trouble:

1. From the **Orders > Reports > Customer Calling Queue** menu, select **Trouble Order Notification** to display the Trouble Order Notify screen.
2. Complete any or all of the following information to set the parameters for selecting which troubled orders you want to send notifications for:

Field	Description
Days in Trouble	Enter the number of days difference between the Ship Date on the order and the Earliest Available Date of the product waiting fulfillment. For example, if you enter 2, the system sends notifications for orders that have 2 days between the ship date on the order and the day the product will be available.
End Dt	Enter the orders' ship date. We recommend using a future date to give your customers notice that their orders may be late. The system looks at all orders up to the date you enter here.
Branch	(Required) Enter the shipping branch for which you want to notify customers about trouble orders. To send notifications about orders from all your branches, enter All.
Writer	Enter an order writer's user ID to limit notifications to only the orders written by that specific writer.
Via	Enter the shipping method, for example, UPS to limit notification ton only orders with that ship via.
In Slsp	Enter an inside salesperson's user ID to limit notifications to only the orders for that specific salesperson.
Out Slsp	Enter an outside salesperson's user ID to limit notifications to only the orders for that specific salesperson.

3. Do one of the following to generate the notifications for your customers based on their activity trigger settings:
   - Use the **Begin** hot key to generate the notifications now.
   - Use the **Schedule** hot key to schedule the process to run at a later time, or to set the process to run at regular intervals.

Automating Customer Calling Queue Followup

In addition to manually monitoring the Customer Calling Queue for sales orders that need attention, you can also automate your use of the Customer Calling Queue using the **Order In Calling Queue** activity trigger. Using this activity trigger allows you to automatically send a message, or a copy of a sales document, to a customer whose order has been sent to the Customer Calling Queue. You identify customers for whom you want to use this feature on a customer-by-customer basis in Customer Maintenance. You also identify the specify types of orders for which the activity trigger applies.

To automate Customer Calling Queue followup:

1. Display a customer record in Customer Maintenance.
2. Select the **Add'l Info** hot key, and then the **Activity Trigger** hot key to display the Activity Trigger Maintenance screen.
3. In the **Trigger Description** column, type **Order In Calling Queue** and press **Enter**.
4. In the **Activity Description** column, press **F10** and select any of the following actions:
   - **E-mail Sales Doc** — Sends the customer a copy of the sales document when one of their orders displays in the Customer Calling Queue.
   - **E-mail Message** — Sends the customer an email when one of their orders displays in the Customer Calling Queue.
   - **E-mail Sales Doc HTML** — Sends the customer an HTML version of the sales document when one of their orders displays in the Customer Calling Queue.
   - **Fax Sales Doc** — Faxes the customer a copy of the sales document when one of their orders displays in the Customer Calling Queue.
5. Select the **Trip Props** hot key to display the Calling Queue Notification Trigger screen.
6. Enter field information, as needed, to designate the types of orders that you want the activity trigger to apply to. For example, you could designate that only orders with a specific writer or salesperson be affected.
7. Press **Esc** to return to Activity Trigger Maintenance.
8. Select the **Activity Props** hot key and set properties for the activity you selected in the Activity Description column. For example, if you specified that the customer receives an email message, you must enter the email address and subject line, along with any other details you want to include.
9. Press **Esc** to save your changes and return to the Activity Trigger Maintenance screen.
10. Press **Esc** to save your changes and exit the Activity Trigger Maintenance screen.

Scheduling Follow-Up Phone Calls

From the Customer Calling Queue, you can use the Log Call feature to enter details about a customer phone call you made, or to schedule your next follow-up phone call. You can use this same feature to specify that a customer receives a reminder postcard.

To schedule a follow-up phone call:

1. From the **Orders > Queues** menu, select **Customer Calling Queue**.
2. Select orders on the Customer Calling Queue screen, and locate the order for which you want to schedule a follow-up phone call.
3. With the order selected, use the **LogCall** hot key.
4. In the **Next Call** field, enter the date on which you want this order to once again display in the Customer Calling Queue.
5. In the **Comment** field, type comments about a call you have made or other comments you want to remember in future.
6. Press **Esc** to return to the list of orders in the Customer Calling Queue. Use these steps to schedule other follow-up phone calls, as needed.

Printing Reminder Postcards

Use the Print Reminder Postcards feature to schedule and print postcard reminders for your customers. The 3" x 5" postcards inform the customers that either:

- Part of their order is available.
- Their order is complete.
- This is their final notice.

The system automatically generates the appropriate message, based on the order's status and the settings for the control maintenance record named Order Return To Bid Parameter. You can also customize the cards by adding your own message. For example, add a message listing seasonal hours of business, so customers know when they can stop by to pick up their orders. Each order's Change Log records when a postcard gets made.

Before printing reminder postcards, specify which customers need to get a postcard. This is done using the **Log Call** hot key on the Customer Calling Queue screen. Use this same hot key to schedule follow-up phone calls and log phone call comments.

To specify that a customer gets a postcard:

1. From the **Orders > Queues** menu, select **Customer Calling Queue**.
2. List the desired order on the Customer Calling Queue screen.
3. With the order selected, use the **Log Call** hot key. This opens a screen where you can specify follow-up details, including whether the customer should get reminder postcards.
4. After entering a **Next Call** date, enter a **Y** in the **Mail Card** field. This indicates that the customer should receive a reminder postcard when reminders are printed.

To print reminder postcards:

1. From the **Orders > Printing** menu, select **Print Reminder PostCards** to open the Print Reminder Postcards screen.
2. In the **Br/Tr/All** field, enter the branches or territories for which you want to print postcards. Enter ALL to print postcards for all branches and territories.
3. In the **Selecting Branch** field, press **F10** and specify whether to print the postcards based on the selected branch being the **Shipping** or **Pricing** branch.
4. Verify that the **Postcard Message** field displays the desired message. If not, use the **Msg** hot key to create or edit a message; press **Esc** when done.

   You can save a different message for each branch. Each branch's message is active when that branch is selected in the **Br/Tr/All** field.

5. Use one of these hot keys to finalize printing:
   - **Print –** Sends the postcards to the printer.
   - **Hold –** Sends the postcards to your Hold file, where they are held for later viewing or printing.
   - **Opt –** Displays a list of printing options. These options let you schedule the postcard printing, display the Fax Memo screen, specify a user-defined heading, or forward the postcard information to another user. For more information on printing options, see the Report Options and Printing topic.

Tracking Third-Party Shipments

Use the Shipment Tracking feature to access package-tracking features on a carrier's website. When using the StarShip for Eclipse companion product, take advantage of automated tracking of Airborne Express, FedEx, UPS, USPS, and other shipments. Selecting the carrier lets you go directly to their website, which opens in your default Web browser. Internet access and a current Web browser are required.

To track a shipment:

1. Open the sales order for the shipment and display the order's Header screen.
2. Use the **Shipping** hot key to display the Shipping Inquiry prompt.
3. Press **F10** and select a carrier from the list.
4. Press **Esc** to display the carrier's website in your browser.

   Note: You can also select **MapQuest** or **Google Maps** to display a map that includes the customer's ship-to address.

5. If necessary, follow the website's on-screen instructions.

Viewing Items in a Sales Order Generation

Use the View Order Entry Items screen to review the quantities and availability of each item on the order.

To view the items that comprise an order generation:

1. Create or open a sales order and display the order's Status screen.
2. Use the **View Items** hot key to display the View Order Entry Items screen.
3. Review the following fields:

Field	Description
Status	The current status of the selected order generation.
Ship Branch	A number that identifies the branch from which the order will ship to the customer.
Shipdate	The date the product is scheduled for transport to the customer.
Qty/Unit	The amount of the item to sell, and its proportions as it is packaged for sale, such as 1 each (ea), 1 box (bx), or 1 case (cs).
Product Description	A statement that identifies the item to sell.
Ship Qty	The amount of the item scheduled to be sent to the customer.
B	The quantity on backorder.
Earliest Avl	The earliest date the item will be available to ship.

4. To view the products on a lot item, use the **View Lot Item Mat'l Detail** hot key to display the Lot Item Material Detail screen.
5. Press **Esc** to return to the Sales Order Entry Status screen.

Reviewing Sales Orders with Unearned Revenue

Use the Unearned Revenue Review Queue to track *single-invoice* orders that are incomplete. Single-invoice orders are orders where the customer prefers to receive one invoice upon the first shipment, regardless of how many shipment generations the order includes.

Until shipped, items are debited against a General Ledger account for Unearned Revenue. Sales or accounting personnel can use the Unearned Revenue Review Queue to track the progress of single-invoice orders. Orders in the queue can also be edited, in case you need to remove late items the customer no longer wants. The excess funds can be applied to the customer's next order.

You can set single invoicing for a customer by enabling the **Single Invoice? (Y/N)** field on the Additional Customer Pricing/Printing Data screen. You can set single invoicing for an order using the **Single Invoicing (Y/N)** field on a sales order's Totals screen.

To review orders with unearned revenue:

1. From the **Orders > Queues** menu, select **Unearned Revenue Review Queue**.
2. In the **Branch** field, press **F10** and specify one or all branches, whose orders you want to list.
3. In the **Select Type** field, press **F10** and select which orders to list:
   - Select **Complete** to list orders that have completely shipped.
   - Select **Open** to list orders that have *not* completely shipped. After you select this option, you are prompted to enter the minimum number of days since the last open ship date for which you want to view open, single-invoice orders that have not shipped. This option is useful when you want to close out an order that is no longer active.
   - Select **Both** to list all orders with unearned revenue.
4. If prompted, enter the minimum number of days since the last open shipping date.
5. Review the field information. If an order has multiple open generations, they display combined on one line in the queue. Closed generations display separately.
6. If desired, use hot keys to **View** or **Edit** a selected order. For example, edit an order to remove unshipped items that are no longer needed.

Field	Displays...
Order #	sales order number.
Customer	customer name.
Order Amt	total for each order generation, followed by total remaining amount for entire order.
Unearn Amt	unearned amount, which is the amount billed in advance for unshipped items. A negative amount indicates a debit against the G/L account for Unearned Revenue. A positive amount indicates a generation that later shipped, offsetting the debit.

Reprinting Sales Orders

Use the Order Reprinting Options screen to reprint an open order generation. You can print a duplicate copy of an original picking ticket, or print a clean copy of a changed order. You can also change the order status or ship via method for the open generation.

Although this screen primarily works with the Shipping Manifest Queue and the RF Warehouse Management system, you do not need to have either of these enabled to use it. Refer to the Shipping Manifest and the RF Warehouse Management topics for more information on features related to those products.

The Order Reprinting Options screen is available using a hot key from various screens, such as the order Status screen described in the following steps. It is also available from the **Orders > Printing** menu. When opening the screen from a menu, you must specify which order number and ship date generation to reprint.

To reprint an invoice using the Order Reprint Options screen, you must have the SOE.REPRINT.INVOICE authorization key. You must have the SOE.PRINT.INVOICE authorization key to print original invoices.

To reprint an open order generation:

1. Open a sales order and display the order's Status screen.
2. Use the **Print Opt** hot key to display the Order Reprinting Options screen. The selected order number, ship date, customer name, and default field settings for the customer automatically display.
3. Review or change the field settings, as needed:

Field	Specifies...
Order #	the order number for reprinting.
Ship Date	which shipping date generation of order.
Customer Name	the customer.
Print Style	which order format, and pricing information, is printed. Press **F10** for a list.
Order Status	the order status, which determines when and how order is processed. Available statuses: • **B – Bid** • A – Acknowledgement • M – Order Summary
# of Copies	how many copies to reprint. **Note:** If you print more than one copy of any transaction, all copies after the first are labeled as "Reprint."
Review Queue Status	the in-process status of generation; for example, Picking, Staging, Packing, Manifest, or Close. Press **F10** for list. Leave blank if using Open Order Status Review Queue to control tickets.

Field	Specifies...
Ship Via	the shipping method. **Note:** Orders with a Ship Via of Review no longer automatically print a ship ticket. Also, when printing orders with a Pick Up Now status, the system warns you that you are releasing a shipping ticket.

4. Use the **Print** hot key to print the order.
5. Use the following hot keys, as needed. Hot keys for a shipping manifest are only available if the order in on a manifest.

To...	Use this hot key...
reprint the picking ticket	**Print**
open the original sales order for viewing	**View**
open the original sales order for editing	**Edit**
print specialty labels and forms	**Label** The User-Defined Document/Label Printing screen displays.
fax a copy of the order	**Fax** The Fax Memo screen displays.
view the order's picking status	**InProcess** The Warehouse In Process Queue displays, if enabled.
enter or edit shipping quantities	**Shipping Pkgs** The Shipping Package Quantities screen displays. **Note:** You can enter shipping package information for each tote on an order.
add a generation to the shipping manifest	**Ready to Mnfst** The Ready to Manifest screen displays.
enter or edit invoice comments on the manifest	**Mnfst Comments**
edit the generation's manifest	**Edit Mnfst** The Shipping Manifest Queue screen displays.
send the picking ticket as an e-mail attachment	**E-Mail** The Send E-Mail screen displays. **Note:** The invoice number for invoiced orders and received purchase orders displays in the subject line of the email when it is sent.

6. Press **Esc** to return to the order's Status screen.

Reprinting Pick Tickets

Use the Order Reprinting Options screen to reprint the pick ticket for an open order generation. You can print a duplicate copy of an original pick ticket, or print a new pick ticket to reflect changes made to the order. You can also use this screen to change the order status or ship via method for the open generation.

For details on how to reprint a pick ticket, see the Reprinting Pick Tickets topic in the Warehouse section of the help system.

Batch Reprinting Invoices, Purchases, or Transfers

Use the Batch Reprint screen to review invoices, purchases, or transfers that were previously printed. The screen lists the documents you specify. You can then reprint or fax any or all of the documents.

The system generates a batch number when documents are printed using the Print Invoice screen. You can specify the batch number to recall the documents and settings. View the System Activity Log to inspect the batch numbers; access to this log requires SYSTEM.ACTIVITY.LOG authorization. If you do not know how to access the log, see your System Administrator.

> **Note:** If you print more than one copy of any transaction, all copies after the first are labeled as "Reprint."

To batch reprint invoices, purchases, or transfers:

1. From the **Orders** > **Printing** menu, select **Batch Reprint Invoices/Purchases/Transfers**.
2. In the **Branch** field, press **F10** and specify which branch to use.
3. If desired, use the **Batch Number** field to enter a system-generated batch number. If you specify a batch number, leave the **Order Type**, **Document Type**, and **Print Date** fields blank.
4. In the **Order Type** field, press **F10** and specify the type of orders to review: Sales, Purchase, or Transfer.
5. If desired, in the **Document Type** field, press **F10** and specify the type of document. The available document types depend on the **Order Type**. For example with invoices, you can select a Bid, Sales Acknowledgment, Ticket, Invoice, or Direct Ship type.
6. In the **Print Date** field, press **F10** and specify the calendar date when the documents were first printed.
7. Review or edit the field information for the documents listed. Some fields are view-only.

Field	Description
Prt	Specifies how to process the invoices. Choose one of the following: • **Yes** – Print • **No** – Do not process • **Fax** • **Batch Reprint** – Reset Print Status to B.

Field	Description
Prv	Specifies how each invoice was transmitted by the original batch. Available values: • **P**– Print • **A**– Email • **E**– EDI • **B**– B2B • **X**– XML • **F**– FAX **Note:** If a hyphen (-) displays next to an invoice, no batch number was entered.
Order #	Specifies the order number.
Customer/ Vendor/Branch	Specifies the customer, vendor, or branch.
PO #	Specifies any purchase order number.
Via	Specifies the ship via method.

8. Select the orders to reprint by specifying a **Y** in the **Prt** field. You can also use the hot keys, as needed.

To...	Use this hot key...
toggle the **Prt** status of all documents (from **N** to **Y**, for example)	**All**
toggle the **Prt** status from the selected item to the end	**Select to End**
save or recall a selection list	**Batch ID** The Batch IDs Selection screen displays. Use this screen to clear a selection list, save a selection list, or recall a previously saved selection list.
list only orders for a specific customer account	**Customer Select** You are prompted to enter the customer. Next, press F10 to select either the bill-to or ship-to account.
switch between the bill-to and ship-to name	**Change View**
open the selected order for viewing	**View**
open the selected order for editing	**Edit**

To...	Use this hot key...
print documents with a **Y** status, fax documents with an **F** status, and reset the print status of documents with a B status	**Print** You are warned about any customers that do not have a fax number. Any credit card transactions included are authorized before printing. **Note:** You must rerun the batch invoice process for any invoices that had a B status.
send the current list to your hold file	**Hold**
select only invoices that were transmitted using a particular method during the previous batch run	**Transmission Method Slct** Select a method and press **Enter**. • **P**– Print • **A**– Email • **E**– EDI • **B**– B2B • **X**– XML • **F**– FAX • **ALL**

How Order Status Drives Document Printing

The system generates one of the following documents based on the order status of the generation:

When the order status is...	This is what prints...
Bid	Bid
Cancel	Nothing
Pick Up Now	Invoice
Call When Available	Acknowledgement
Ship When Available	Acknowledgement
Ship Item Complete	Acknowledgement
Call When Complete	Acknowledgement
Ship When Complete	Acknowledgement
Direct Shipment	Acknowledgement
Call When Specified	Acknowledgement
Ship When Specified	Acknowledgement

How Print Status Drives Document Printing

The print status of an order generation determines when and how documents, such as invoices or order acknowledgements, are printed. Administrators can set defaults for different types of documents using the Order Status Print Status Defaults control maintenance record. Some statuses are unavailable for particular types of printing.

Note: Use the **Remove Orders from the OOSRQ When Prt Status Changed To** control maintenance have the system remove orders from the Open Order Status Review Queue when the print status has changed to a specific print status.

Code...	Status...	Specifies this...
Y	**Print**	Print document. If you have the SOE.REPRINT.INVOICE authorization key, but not the SOE.PRINT.INVOICE authorization key, and an invoice has not been printed, this option is not available to you for invoice generations.
N	**No Print**	Do not print document.
F	**Fax**	Fax document.
A	**E-mail**	E-mail document. **Note:** You can also e-mail a single order generation from the Status screen by selecting that generation and choosing the **Print Opt** hot key, and then the **E-mail** hot key.
B	**Batch Print**	Print with next batch of these documents.
H	**Hold**	Hold document for printing later. For example, use when transaction is waiting on P/O number or review before processing.
P	**Preview**	Include in the Detailed Invoice Preview Report, before any printing. A typical status for invoices.
Q	**Queue**	Include in the Invoice Preview Queue, which some companies use before the Detailed Invoice Preview Queue.
M	**Manifest**	Use on shipping manifest, and use its printing rules.
E	**EDI**	Send using Electronic Data Interchange (EDI).
C	**Credit Card Authorization**	A user has specified a status of B and the following conditions exist: • Credit card information is attached. • There is an open balance. • The credit card authorization method is set to Authorize After Review.
T	**Ticket**	A Ship Ticket status. Do not use without instruction.

Showroom Sales Upgrades Overview

The system makes it easy for you to upgrade sales for your retail showroom customers. Sales order management features let you substitute upgraded products using the Showroom Product Change view. You can also print order acknowledgments that show the substitute products and their retail price differences.

The showroom upgrade features let retail customers modify a standard set of products, and get an itemized receipt of the changes. For example, you or a contractor could specify a basic set of fixtures. However, you could also allow showroom customers to substitute upgrade fixtures. Using the system showroom upgrade features, you can easily exchange products within the basic set, and then print a receipt for the retail showroom customer that shows their changes.

For more information, see Upgrading Showroom Sales.

Preparing to Upgrade Showroom Sales

Before making showroom product changes, create the basic sets of products your customers start with. Do this by entering sales orders for the products, and saving the sales orders as bids. Use the saved bids as templates for customer showroom orders.

Assigning Showroom Views

Assign a user's order entry views using the OE View Selection screen, which is accessed through the **OE View** hot key on the User Maintenance screen. For more information on assigning views, see the User Maintenance topics. Once views are assigned, they can be selected during sales order entry.

To upgrade showroom sales, you need to have these custom screen views available:

- Showroom Product Change
- Showroom Difference
- Showroom View with Retail Price

If you are missing any of these custom screen views, please contact the Eclipse Support Department.

Setting Up Print Styles

Use the **Showroom** print style when upgrading showroom sales.

Setting Up Computer Terminals

Many companies set up their showroom computers to create bids, rather than sales orders.

To set up showroom terminals to create bids:

1. Create a ship via that defaults to the Bid order status.
2. Assign showroom terminals to use the ship via you created.
3. Create a custom menu that displays only the menus and screens used for showroom sales.
4. Assign showroom salespeople the custom root menu you created.

Saving and Using Bids

Any sales order can be saved as a bid. Create a sales order with the desired products, then use the Body screen's **Mode** hot key to select the **Bid** option. For more information, see Creating and Copying Bids.

When customers visit your showroom to upgrade a basic order, open the saved bid. Copy it, or change it into an order.

Changing Bids to Orders

You can change a bid into an order by changing its order status from Bid to any other status, such as Pick Up Now, on the bid’s Status screen. For more information, see Converting Bids into Sales Orders.

Using Print Styles and Bids

The Showroom print style is especially designed for showroom customers. Use this print style to print a customer acknowledgment that details their product substitution and the difference in retail price.

When converting bids to orders, the order generation uses the print style for the bid — instead of using the print style for the customer. Before saving a bid that you will use for subsequent showroom orders, specify the Showroom print style. For more information, see Using Print Styles.

Specifying Sales Sources

Sales sources are useful for categorizing sales in reports. If your company uses a Showroom Sales source, use the Header screen's **Sale Source** field to specify it. For more information, see Tracking Order Sales Sources.

Upgrading Showroom Sales

Use the showroom upgrade sales process to substitute products for retail customers. Follow these main tasks:

- Copy an existing bid
- Make a showroom product change
- Print a customer acknowledgement

Copying a Bid

The easiest way to upgrade a showroom sale is to open and modify a bid that contains the desired set of products.

To use a bid for a showroom sale:

1. Display the existing bid that contains the basic set of products the customer wants to upgrade.
2. Select the **Mode** hot key, and select the **Copy to Sales Order Bid** option to display the Copy Order to Bid screen.
3. Enter the following details:
   - **Enter Price Branch –** Enter a new price branch, if applicable.
   - **Enter Ship Branch –** Enter a new ship branch, if applicable.
   - **Ship-To Same Customer? (Y/N) –** Enter **No**, so you can specify a new customer.
   - **Ship-To Customer –** The customer to whom this sale will be made.
   - **Gens to Copy –** Specify **Current**, **All**, or **Open** to specify which generations to copy.
   - **Copy Current Pricing? (Y/N) –** Specify **Yes** or **No**, depending on whether you want to use the pricing currently on this bid.
4. Select the **Begin** hot key to display the Body screen of a new sales order bid for the new customer.
5. Process the order as usual.

For more information, see Preparing to Upgrade Showroom Sales.

Making a Showroom Product Change

With the **Showroom Product Change** view chosen, you can substitute products as desired. Before substituting a product, you need to save a reference to the original product. This reference can be useful for later review; it also lets the system automatically recalculate the pricing difference for the substitution.

To make a showroom product change:

1. With the cursor in the **Original Product** field adjacent to the product you want to substitute, type any character and press **Enter**. This action automatically saves the reference from the **Product Description** field into the **Original Product** field.
2. Once the original product's reference has been saved, substitute a product by editing the product's **Qty/Unit** and **Product Description** fields.

Printing an Acknowledgement Using the Showroom Print Style

The Showroom print style lets you quickly print a customer acknowledgment that details the differences in retail and total prices for any product substitutions.

The Showroom print style adds columns that detail any unit price and extended price differences for substitute products. Calculated fields show the subtotal, sales tax, freight, and total amount. This lets your retail customer walk away from the showroom upgrade with an easy-to-understand receipt for their additional charges.

To specify a print style, use either of these methods:

- In the **Print Style** field of an order's Header screen, specify a print style. You can press **F10** and choose a print style from the list, or enter the name of the desired print style.
- On the Order Reprinting Options screen, specify a print style. This screen is displayed by pressing the **Print Opt** hot key from an order's Status screen. The Order Reprinting Options screen lets you identify, edit, and reprint a designated order generation. In addition to specifying the print style, this screen also lets you specify how many copies to print. When you are satisfied with the print options, use the screen's **Print** hot key.

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