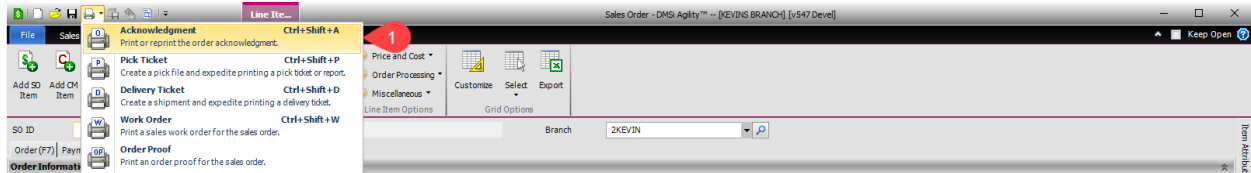


SALES ORDER ENTRY (DELIVERY) FAQs

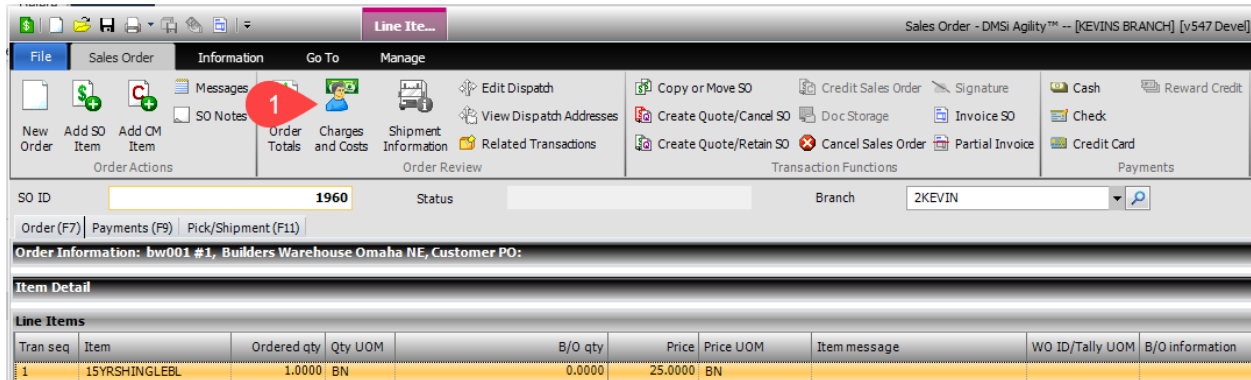
How do I print an Order Acknowledgement?

Once a Sales Order is saved, you can use the Print icon to generate an Order Acknowledgement for your Customer. This will help confirm the Customer order.

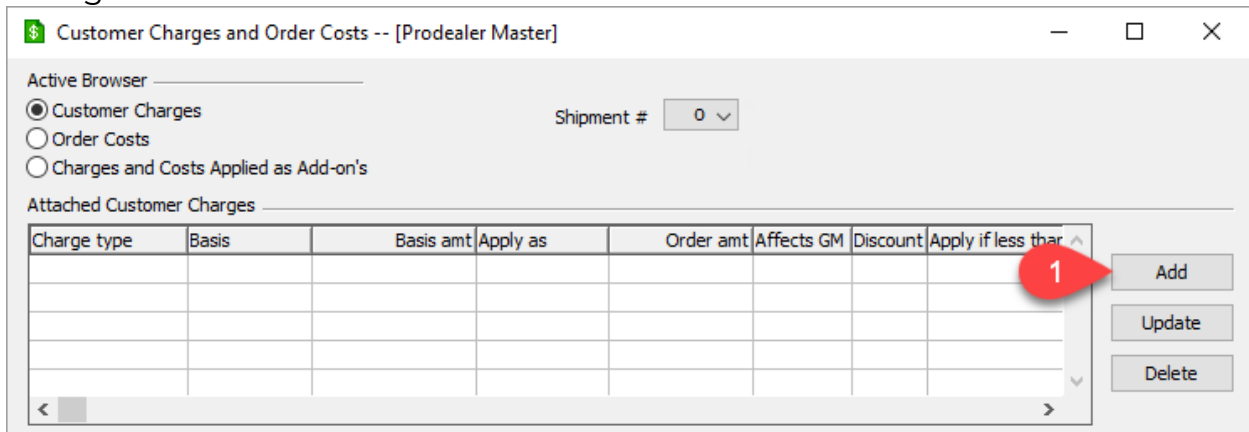


How do I add a Delivery Charge (or any charge)?

You can add a customer charge by clicking the Charges and Cost Icon within the Sales Order ribbon.



The following window will then allow you to select predefined Customer Charges.



How can I review my order totals?

You can review the Sale Order totals by clicking the Order Totals icon within the Sales Order ribbon.

The screenshot shows the 'Sales Order' ribbon in the DMSI software. The 'Order Totals' icon, which depicts a dollar sign and a bar chart, is highlighted with a red circle containing the number 1. Other icons in the ribbon include 'New Order', 'Add SO Item', 'Add CM Item', 'Messages', 'Order Review', 'Charges and Costs', 'Shipments', 'Related Transactions', 'Copy or Move SO', 'Create Quote/Cancel SO', 'Create Quote/Retain SO', 'Cancel Sales Order', 'Credit Sales Order', 'Doc Storage', 'Invoice SO', 'Partial Invoice', 'Cash', 'Check', 'Credit Card', 'Reward Credit', and 'Payments'.

This will display totals including charges, tax amounts, discounts, weights and GM information (security permitting).

The screenshot shows the 'Sales Order Totals for 1960 -- [KEVINS BRANCH] [v547 Devel]' window. It displays a summary of the order's financial details. Below the summary, there is a 'Shipping details' section with a table showing shipment status and costs.

SO ID	1960	Terms discountable	25.00	Cost type	Item default
Sell	25.00	ADF	0.00	Cost	14.36
Charges	0.00	Net terms discountable	25.00	GM	10.64
Tax	1.76	Terms discount allowed	0.25	GM %	42.56
Total	26.76	Taxable sell adjustment	0.00	Estimated profit	0.00
Currency	USD	Weight	10.00	Order costs	0.00
		Load	10.00	Add-on charge	0.00
				Add-on cost	0.00

Shipment #	Status	Sell	Charges	Tax	Total	Cost	Order costs	GM	GM%	Weight	Load	ADF	Other charge no
1	Available	25.00	.00	1.76	26.76	14.36	.0000	10.64	42.56	10.00	10.00	.00	
		25.00	.00	1.76	26.76	14.36	.0000	10.64		10.00	10.00	.00	

1 of 2
Close

What is the difference between Messages and Notes?

Messages will print on forms and can be used to provide instruction or specific information. Notes are strictly for internal use and will not be printed on forms.

The screenshot shows the 'Sales Order - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]' window. The 'Information' menu is open, highlighting 'Messages' and 'SO Notes'. The 'Order Actions' section includes 'New Order', 'Add SO Item', and 'Add CM Item'. The 'Order Review' section includes 'Order Totals', 'Charges and Costs', 'Shipment Information', and 'View Dispatch Addresses'. The 'Transaction Functions' section includes 'Copy or Move SO', 'Create Quote/Cancel SO', 'Create Quote/Retain SO', 'Cancel Sales Order', 'Credit Sales Order', 'Doc Storage', 'Invoice SO', 'Partial Invoice', 'Signature', and 'Reward Credit'. The 'Payments' section includes 'Cash', 'Check', and 'Credit Card'. The 'SO ID' is 1960, 'Status' is blank, and 'Branch' is 2KEVIN. The 'Order Information' is 'bw001 #1, Builders Warehouse Omaha NE, Customer PO:'. The 'Item Detail' section shows a table with one line item: '15YRSHINGLEBL' with 'Ordered qty' 1.0000, 'Qty UOM' BN, 'B/O qty' 0.0000, 'Price' 25.0000, 'Price UOM' BN, 'Item message' blank, 'WO ID/Tally UOM' blank, and 'B/O information' blank.

How can I edit a line item that has already been entered?

Double clicking a line item will allow you to edit information by expanding the Item Detail section of the Sales Order.

The screenshot shows the 'Sales Order - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]' window with the 'SO Item Det...' window open. The 'Item Detail' section is expanded, showing a table with one line item: '15YRSHINGLEBL' with 'Ordered qty' 1.0000, 'Qty UOM' BN, 'B/O qty' 0.0000, 'Price' 25.0000, 'Price UOM' BN, 'Item message' blank, 'WO ID/Tally UOM' blank, and 'B/O information' blank. A red circle with the number 1 is placed over the 'Item message' column. The 'Item Detail' section includes fields for 'Item', 'Discount', 'Ext weight', 'Ext load', 'Cost', 'GM', 'GM %', 'Market cost', 'Dimension', 'Size', 'Item desc', 'Market GM', 'Market GM %', 'Item message', and 'Available qty'. The 'Item' field is '15YRSHINGLEBL', 'Discount' is 'No Discount', 'Ext weight' is '10.00', 'Ext load' is '10.00', 'Cost' is '14.3609', 'GM' is '10.64', 'GM %' is '42.56', 'Market cost' is '14.0000', 'Dimension' is blank, 'Size' is '15 YR SHINGLE BLACK', 'Market GM' is '11.00', 'Market GM %' is '44.00', 'Item message' is blank, and 'Available qty' is '975.5000'.

How can I see the Customer's order history?

When in the Item Detail section, you can select Order History from the Sales

Order Ribbon.

This will display any Items purchased by your Customer with the date range specified.

Tran ID	Invoiced Date	Item	Original Invoice ID	Shipment #	Original Item	Dimension	Invoiced Qty	Qty UOM	Piece Count	Invoiced Price	Price UOM	Ext Pri
1649	04/15/2020	15YRSHINGLEBL		1			1.0000	BN		50.2312	BN	50.
1643	04/09/2020	3080SLAB2		1			1.0000	EA		30.0000	EA	30.
1643	04/09/2020	3080SLAB		1			1.0000	EA		0.0000	EA	0.
1642	04/09/2020	3080SLAB		1			1.0000	EA		45.0000	EA	45.
1599	04/07/2020	35galnail3		1			1.0000	BX		10.0000	BX	10.
1591	04/06/2020	3080SLAB		1			1.0000	EA		0.0000	EA	0.
1536	03/26/2020	15YRSHINGLEBL2		1			1.0000	BN		19.3645	BN	19.
1479	03/12/2020	30YRSHINGLEBL		1			-1.0000	BN		37.0370	BN	-30.
1473	03/11/2020	ZOTHER		1			1.0000	EA		0.0000	EA	0.
1428	03/02/2020	15YRSHINGLEBL		1			1.0000	BN		50.2312	BN	50.
1365	02/26/2020	HWL0404RG		1		4X4X08	3.0000	PC		550.0000	MBF	17.
1344	02/21/2020	KE0000000166		1			1.0000	EA		38.4615	EA	38.
1343	02/21/2020	KE0000000165		1			1.0000	EA		38.4615	EA	38.
1342	02/21/2020	15YRSHINGLEBL		1			1.0000	BN		50.2312	BN	50.
1341	02/21/2020	KE0000000164		1			1.0000	EA		38.4615	EA	38.
1336	02/20/2020	0204PINE		1		2X4X10	1.0000	UNIT	10	0.1667	PC	1.

How can I copy an Order?

You can copy a previous Sales Order or move an existing Sales Order to another branch by clicking the Copy or Move SO icon.

SO Item Det... Sales Order - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]

File Sales Order Information Go To Actions

New Order Add SO Item Add CM Item Messages SO Notes Order Totals Charges and Costs Shipment Information View Dispatch Addresses Edit Dispatch View Dispatch Addresses Copy or Move SO Create Quote/Cancel SO Create Quote/Retain SO Credit Sales Order Doc Storage Invoice SO Cancel Sales Order Partial Invoice Cash Check Credit Card Reward Credit Payments

SO ID 1960 Status Branch 2KEVIN

Order (F7) Payments (F9) Pick/Shipment (F11)

Order Information: bw001 #1, Builders Warehouse Omaha NE, Customer PO:

Item Detail

Line Items

Tran seq	Item	Ordered qty	Qty UOM	B/O qty	Price	Price UOM	Item message	WO ID/Tally UOM	B/O information	B/O c
1	15YRSHINGLEBL	1.0000	BN	0.0000	25.0000	BN				

Can I see if my Sales Order is linked to another transaction?

Clicking the Related Transactions icon will display any Orders linked to a specific Sales Order.

Line Item... Sales Order - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]

File Sales Order Information Go To Manage

New Order Add SO Item Add CM Item Messages SO Notes Order Totals Charges and Costs Shipment Information View Dispatch Addresses Edit Dispatch View Dispatch Addresses Copy or Move SO Create Quote/Cancel SO Create Quote/Retain SO Credit Sales Order Doc Storage Invoice SO Cancel Sales Order Partial Invoice Cash Check Credit Card Reward Credit Payments

SO ID 1960 Status Branch 2KEVIN

Order (F7) Payments (F9) Pick/Shipment (F11)

Order Information: bw001 #1, Builders Warehouse Omaha NE, Customer PO:

Item Detail

Line Items

Tran seq	Item	Ordered qty	Qty UOM	B/O qty	Price	Price UOM	Item message	WO ID/Tally UOM	B/O information
1	15YRSHINGLEBL	1.0000	BN	1.0000	25.0000	BN			

These can include Purchase Orders or Work Orders.

Related Transactions - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]

File Edit Options Window Go To Help

Related Transactions

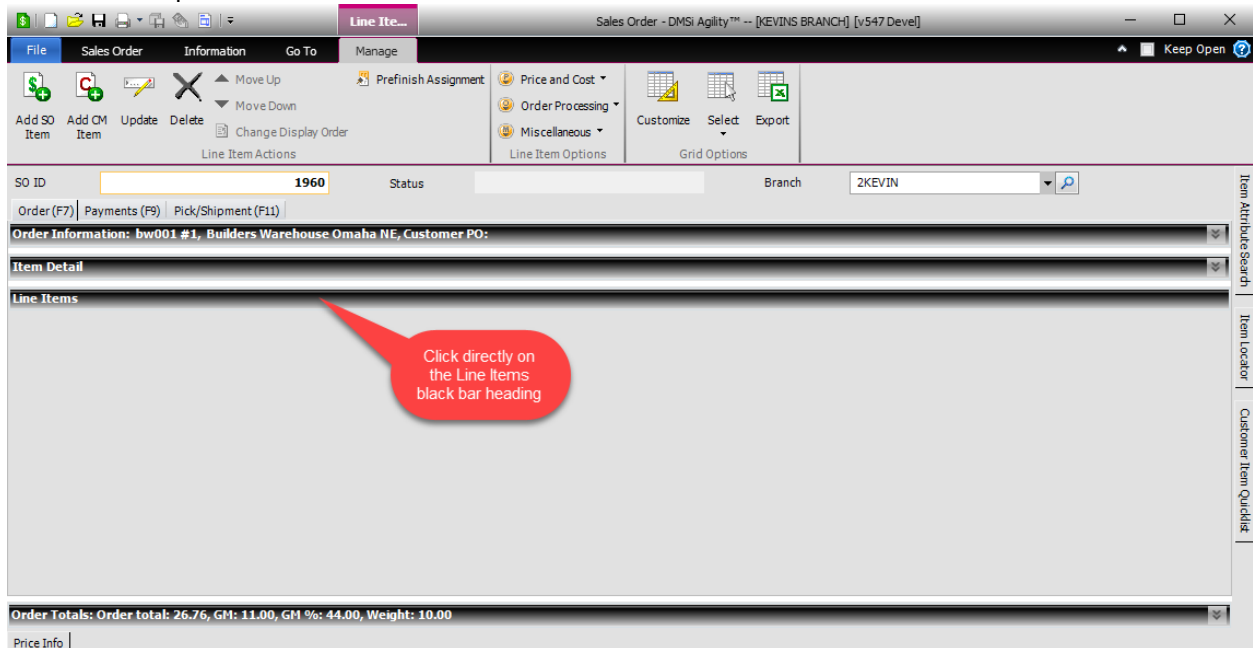
View related quotes, credit memos, branch transfers and linked transactions for items tagged to fill from purchase orders and reman work orders.

Branch ID	Tran type	Tran ID	Cust/Supplier ID	Seq #	Name	City	State	Addtl items exist	Status	Reman expected schedu
2KEVIN	PO	1177	BLS001	1	Brothers Lumbe...	Omaha	NE		Open	

Item	Transfer	Parent item	Quantity	Quantity UOM	Expect date	PO/Reman expect date	Cust/Supplier ID	Seq #	Name	City
15YRSHINGLEBL			1.0000	BN	06/29/20	06/25/20				

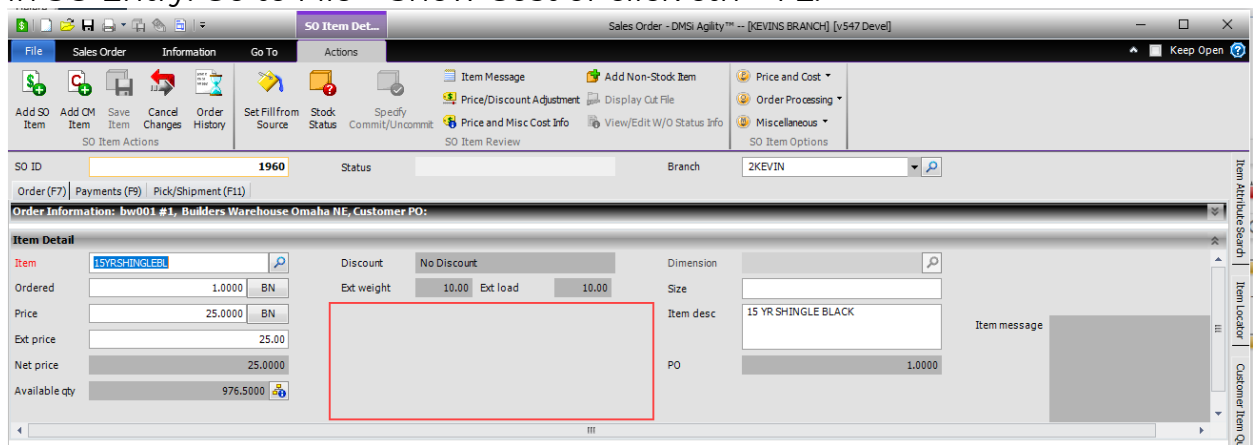
Why is the line items grid greyed out?

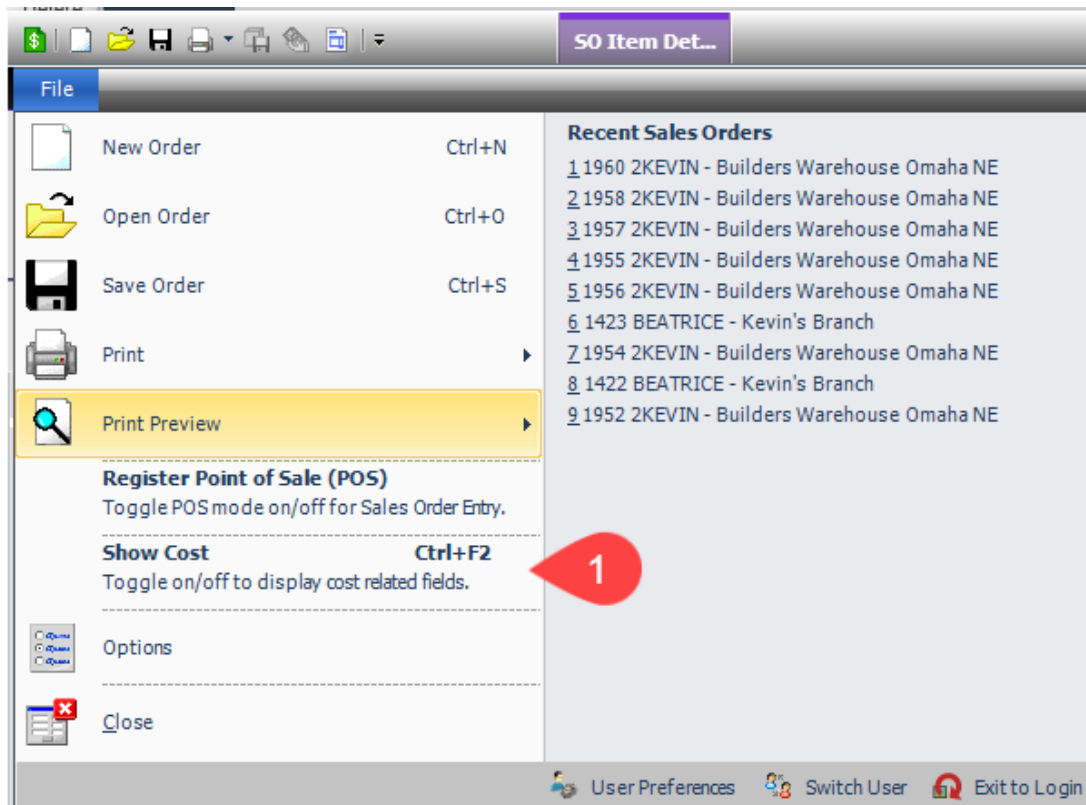
Your line item grids is all greyed out, you can't see any of the line items, and it looks like the window below. You will need to click on the line items heading and click spacebar.



Why is cost and/or gross margin not showing?

You have the security to view margins and costs, but they're not showing up in SO Entry. Go to File > Show Cost or click ctrl + F2.

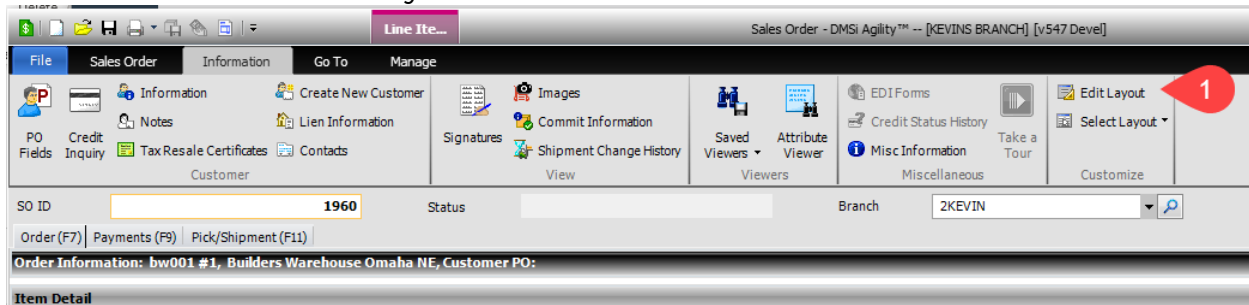




Item Detail		Discount		No Discount		Dimension		Market GM	
Item	15YRSHINGLEBL	Ext weight	10.00	Ext load	10.00	Size		Market GM %	
Ordered	1.0000 BN	Cost	14.0000	GM	11.00	Item desc	15 YR SHINGLE BLACK	Item message	
Price	25.0000 BN	GM %	44.00	PO	1.0000				
Ext price	25.00	Market cost	14.0000						
Net price	25.0000								
Available qty	976.5000								

A field is missing from the line items, item detail, or the order information sections?

You have a field that you either want to add or was previously there but is no longer showing. You will have to edit your layout to add the column. Go to the Information tab > Edit Layout.



This will bring you to the myUI Designer window. You can select the section (1) and Add/Remove Fields (2) for the section you need to add fields. Also not that you can set some fields to editable, required, or read only.

myUI Designer - DMSI Agility™ -- [KEVINS BRANCH] [v547 Devel]

Layout name: KE 50 Layout

Section: **Order Information** (1)

Add/Remove Fields (2)

Adjust Tab Order

Set Section Properties

Show selected fields using the specified mode. Use the canvas below to arrange fields as desired.

Show field	Name	Mode
<input checked="" type="checkbox"/>	Accepts backorder	Read only
<input checked="" type="checkbox"/>	Address 1	Editable
<input checked="" type="checkbox"/>	Address 2	Editable
<input checked="" type="checkbox"/>	Address 3	Editable
<input checked="" type="checkbox"/>	Append to open transfer	Editable
<input checked="" type="checkbox"/>	Auth to charge	Editable
<input checked="" type="checkbox"/>	City, State, ZIP	Editable
<input type="checkbox"/>	Contact DIY notify method	
<input type="checkbox"/>	Contact email	
<input type="checkbox"/>	Contact mobile phone	
<input type="checkbox"/>	Contact name	
<input type="checkbox"/>	Contact phone	
<input type="checkbox"/>	Country	

Customer ID:

Ship-to name:

Price level:

Address 1:

Address 2:

City, State, ZIP:

Phone:

Created by:

Order date:

Sale type:

Customer PO:

Reference:

Expected delv date:

☐ Expected delv date override ☐ On hold

Route ID:

Expected ship date:

Sales agent 3:

Orig OA exp delv date:

Sales agent 1:

Sales agent 2:

Currency:

Ship via:

Tax code:

Payment terms code:

Freight terms:

☐ Taxable ☐ Full payment required ☐ Append to open transfer

☐ Ship complete ☐ Accepts backorder

☐ Priced pick & delivery ☐ Treat as pass-thru ☐ Create PO on save