# **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.

🖪 I 🗋 😂 🖬 🛛	8-6		Sales Order - DMSi Aglity™ [KEVINS BRANCH] [v547 Devel]	– 🗆 X
		Acknowledgment Ctrl+Shift+A Print or reprint the order acknowledgment		🔺 🔳 Keep Open 🗑
		Pick Ticket         Ctrl+Shift+P           Create a pick file and expedite printing a pick ticket or report.	Price and Cost	
Add SO Add CM Item Item		Delivery Ticket Ctrl+Shift+D Create a shipment and expedite printing a delivery ticket.	Miscelaneous Customae Select Export Line Rem Options Grid Options	
SO ID		Work Order Ctrl+Shift+W Print a sales work order for the sales order.	Branch 2KEVIN	Item
Order (F7) Payn Order Informati		Order Proof Print an order proof for the sales order.		Attribute *

## 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.

	<b>B R 8 •</b> A 🗞 (	<b>⊡</b>   <del>-</del>		ine Ite				5	Gales Order - DMSi Agili	ity™ [KEVINS BR	ANCH] [v547 Devel]
File	Sales Order Inf	ormation	Go To 🛛	Manage							
	S. C.	ssages			🕸 Edit Dispatch	🛐 Copy o	r Move SO	Credit Sales Ord	ler 🔌 Signature	📟 Cash	🕮 Reward Credit
	S0	Notes	Channe and		🕆 View Dispatch Addresse	is 🚺 Create	Quote/Cancel SO	🖥 Doc Storage	🛅 Invoice SO	🔜 Check	
	dd SO Add CM Item Item	Order Totals	Charges and Costs	Shipment Information	📁 Related Transactions	Create	Quote/Retain SO	Cancel Sales Or	der 🛅 Partial Invoice	🔜 Credit Card	
	Order Actions			Order Re	view		Trans	action Functions		Pay	rments
SO ID			1960	Status				Branch	2KEVIN	- 1	0
Order (F7	) Payments (F9) Pick/	Shipment (F11)									
Order In	ormation: bw001 #1,	Builders Ware	ehouse Oma	aha NE, Cust	tomer PO:						
Item Det	ail	_	_	_		_	_	_	_	_	_
Line Iten	15										
Tran seq	Item	Ordered o	ty Qty UOM	1	B/O qty	Price	Price UOM	Item message		WO ID/Tally UOM	B/O information
1	15YRSHINGLEBL	1.00	00 BN		0.0000	25.0000	BN				

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

Customer Ch	arges and Orde	r Costs [Prodeale	er Master]				_			×
Active Browser — Customer Char Order Costs Charges and C Attached Customer	osts Applied as A	dd-on's	Shipme	ent # 0 🗸						
Charge type	Basis	Basis amt	Apply as	Order amt	Affects GM	Discount	Apply if less than	~		
							1		Add	
									Updat	e
									Delete	e
<				1	1		>			

## 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.

	🖻 🖯	🔒 • 🖗	4 🗞 🛅 I 🔻			Line Ite						Sales Order - DMSi Agi	lity™ [KEVINS BR	ANCH] [v547 Devel]
File	Sales	Order	Informatio	on G	ю То	Manage								
	S.	C,	Messages	55	<b>1</b>	<b>2</b>	예 Edit	Dispatch	🚮 Copy o	r Move SO	Credit Sales On	der 🔌 Signature	📟 Cash	🕮 Reward Credit
	_	-			_	-	🕸 Viev	/Dispatch Addresse	s 🚺 Create	Quote/Cancel SO	🖫 Doc Storage	🛅 Invoice SO	📑 Chedk	
New / Order	Add SO Item	Add CM Item		Order Totals	Charges and Costs	Shipment Information	📁 Rela	ted Transactions	Create	Quote/Retain SO	🔇 Cancel Sales O	rder 🛅 Partial Invoice	e 🛛 📟 Credit Card	
	Orde	er Actions				Order Re	eview			Trar	nsaction Functions		Pay	ments
SO ID					1960	Status					Branch	2KEVIN	- 1	ο
Order (F	7) Payn	nents (F9)	Pick/Shipm	ent (F11)										
Order In	nformati	ion: bw0	01 #1, Build	ers Ware	house On	naha NE, Cus	itome <b>r</b> P	0:	_	_	_	_	_	_
Item De	tail	_	_	_	_	_	_	_	_	_			_	
		_		_	_		_							
Line Ite								D/0 1		D: 11014	-			D/0: 6
Tran sec					ty Qty UO	M		B/O qty		Price UOM	Item message		WO ID/Tally UOM	B/O information
1	15YRs	SHINGLEE	SL	1.000	0 BN			0.0000	25.0000	BN				
										1				

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

Sales	Order Totals for 1960	[KEV	INS BRAN	CH] [v	547 Dev	el]							_		×
SO ID	1960		Term	is disco	untable		25.	.00		Cost ty	pe	[	Item	default	~
Sell	25.00		ADF				0.	.00		Cost				14	4.36
Charges	0.00		Net	terms d	liscounta	ble	25	.00		GM				10	0.64
Tax	1.76		Term	is disco	unt allow	/ed	0.	25		GM %				42	2.56
Total	26.76		Таха	ble sel	adjustm	ent	0.	.00		Estimat	ed profit	t [		(	0.00
Currency	USD		Weig	ht			10.	.00		Order o	osts			0	0.00
			Load				10.	.00		Add-on	charge			0	0.00
										Add-on	cost			0	0.00
Shipping d	etails														
<b>E</b>	🖷 🖷 🛱	Se	lection <a< td=""><td>11&gt;</td><td></td><td>~</td><td>]</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></a<>	11>		~	]								
Shipn	ment # Status	Sell	Charges	Tax	Total	Cost	Order costs	GM	GM%		Load	ADF		Other cha	rge no (
	Available	25.00 25.00	.00 .00	1.76	26.76 26.76	14.36 14.36	.0000 .0000	10.64 10.64	42.56	10.00	10.00	.00 .00			
<															>
															,
														1 of 2	
														Clo	se

0

#### 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.

s   🗋	😕 🖬 🔒 • 🛱 🗞 🗟	<del>-</del>	Lir	ne Ite				Sa	les Order - DMSi Agilit	ty™ [KEVINS BR	ANCH] [v547 Devel]
File	Sales Order Inform	ation G	io To M	lanage							
		jes 😽	<b>1</b>	<b>2</b>	에 Edit Dispatch	🛐 Copy o	r Move SO	Credit Sales Orde	r 🦄 Signature	📟 Cash	Reward Credit
	SO No	tes			🛞 View Dispatch Addresses	🕻 🚺 Create	Quote/Cancel SO	🖫 Doc Storage	📋 Invoice SO	📑 Check	
New A Order	Add SO Add CM Item Item	Order Totals		Shipment nformation	🖄 Related Transactions	Create	Quote/Retain SO	😢 Cancel Sales Orde	er 🖶 Partial Invoice	🔜 Credit Card	
	OrderActions			Order Re	view		Trar	nsaction Functions		Pay	ments
SO ID			1960	Status				Branch 2	2KEVIN	<b>~</b> 3	C
Order (F	7) Payments (F9) Pick/Shi	pment (F11)									
Order In	formation: bw001 #1, B	uilders Ware	house Omal	ha NE, Cus	tomer PO:	_	_	_	_	_	_
Item De	tail	_	_	_		_	_			_	
Line Iter	ns										
Tran seq	Item	Ordered qt	ty Qty UOM		B/O qty	Price	Price UOM	Item message	v	VO ID/Tally UOM	B/O information
1	15YRSHINGLEBL	1.000	IO BN		0.0000	25.0000	BN				

#### 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.

🚺 🗋 I	🖻 🖬	9 • A	۰ 🗈	<del>-</del>		4	50 Iten	n Det							Sales O	rder - DMSi	Agility™ [KEVINS	BRANCH] [v547 De	vel]
File	Sales	Order	Infor	mation	Go T	Го	Actio	ons											
S.	C,		5	10 M	>				1 1	🔋 Item Me	essage		📑 Add Non	Stock Item	② Price a	ind Cost 🝷			
	_				0.15			-		Price/Di	iscount Ac	tjustmen	t 🕅 Display (	ut File	Order	Processing *			
Add SO Item	Add CM Item		Cancel Changes	Order History			Stock Status	Spe Commit/L		🖥 Price an	id Misc Co	st Info	🐻 View/Edi	t W/O Status Info	Miscel	llaneous 👻			
	SO 1	tem Actio	ns						S	60 Item Re	eview				SO Item	Options			
SO ID						60	5	Status						Branch	2KEVIN		<b>~</b> ,	D	
				nipment (F															
Order Inf	formatio	on: bw00	)1 #1, E	Builders V	Vareho	use Om	iaha Ni	E, Custom	er PO:										
Item Det	ail	_	_	_	_	_	-	_	_	_	_	-				_			
Line Item	15			T										1					
Tran seq	_	_	_		ed qty		м	_	_	B/O qty			Price UOM	Item messag		_	WO ID/Tally UOM	B/O information	B/C
1	15YRS	HINGLEBL			1.0000	BN				0.0000	25	.0000	BN		1				
		) • G @				50 Iter	n Det	_	_	_	_	-	_	Sales Order ·	- DMSi Agility™	[KEVINS BP	RANCH] [v547 Devel]	_	
File	Sales Or	der	Informati	_	io To	Acti	ons							-					
<u>s</u>	G.	H 1	7 8	2	<b>&gt;&gt;</b>	-			Item Me				n-Stock Item	Price and Co Order Proce					
					t Fillfrom Source	Stock Status	S	pecify it/Uncommit					dit W/O Status Info						
1000		em Actions	ngca rin	Story	500100	50003	comm	ių oncomme	SO Item Re					SO Item Opti					
SO ID					1960		Status						Branch	2KEVIN		<b>-</b> ₽	]		
Order (F7)																			
Order Info		: bw001	#1, Buik	lers Ware	house O	maha N	E, Custo	omer PO:		_	_	_	_	_	_	_	_	_	
Item Deta	_	RSHINGLEE	51		P		Discount	No	Discount				Dimension			Q	Market GM	_	11.00
Ordered	151	Kaninalei	9L)	1.0000	BN		Ext weig		10.00 Ext l	oad	10.00	n	Size				Market GM %	_	44.00
Price				25.0000	BN		Cost		20100 0.00		14.3609		Item desc	15 YR SHINGI	LE BLACK		Market GHT /		44.00
Ext price					25.00		GM	- 5			10.6	_					Item messag	e	
Net price				25	5.0000		GM %				42.5	6	во			0.0000			
Available	qty			975.500	00 💑														
							Market c	ost			14.000	10							
Line Item	S																		

## 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.

	😕 🖯	🔒 • G	4 🗞 🖬	=		50 Iter	n Det				Sales Order - DMSi A	gility™ [KEVINS BRANCH]
File	Sales	Order	Infor	mation	Go To	Actio	ons					
Add SO Item	Add CM Item	Save Item	Cancel Changes	Order History	Set Fill from Source	Stock Status	Specify Commit/Uncom	Item Message     Price/Discount Adjustment mit     Price and Misc Cost Info     S0 Item Review	Di		<ul> <li>Price and Cost </li> <li>Order Processing </li> <li>Miscellaneous </li> <li>S0 Item Options</li> </ul>	
SO ID					1960	:	Status			Branch	2KEVIN	<b>م</b> +
Order (F	7) Paym	nents (F9	) Pick/Sh	ipment (F11	1)							
Order In	formati	on: bw	001 <b>#1</b> , B	Builders Wa	arehouse Oi	maha Ni	E, Customer PC	):				
Item De	tail	-	-	_	_	-			-			
Item	1				2	I	Discount			Dimension		2
Ordered				0.000	UOM U					Size		
Price				0.000	UOM U	(	Cost	0.00	00	Item desc		
Ext price					0.00	(	GM		0.00			
Net price					0.0000	(	GM %		0.00	во		0.0000
Available	qty											

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

-		Cust ID: bw001	p. d					
Since:     For SO II		Custib: Dwooi		dore Warehou	use Omaha NE Ship-to: 1	🔎 All		
-	12/24/19 🗨 🖲 Iter		Dui	uers warenou	se omana ne isnip-to;	P All		
) For SO II		n	All From:		🔎 То:	P		
For SO II		duct Group						
	-							
				_		Search		
) 🔍 #	h 📨 猪 💀 🐺 🎟 🔹 I	Show Costs	Include Credit Memos		Include Group Items	Search		
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.
			1				19.3645 BN	19.
1536	03/26/2020 15YRSHINGLEBL2				1.0000 BN		13'3042 DIA	
1536 1479	03/26/2020 15YRSHINGLEBL2 03/12/2020 30YRSHINGLEBL						37.0370 BN	
	03/12/2020 30YRSHINGLEBL		1		-1.0000 BN			-30.
1479 1473	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER		1 1		-1.0000 BN 1.0000 EA		37.0370 BN 0.0000 EA	-30. 0.
1479 1473 1428	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL		1 1 1	4X4X08	-1.0000 BN 1.0000 EA 1.0000 BN		37.0370 BN 0.0000 EA 50.2312 BN	-30. 0. 50.
1479 1473 1428 1365	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG		1 1 1 1	4X4X08	-1.0000 BN 1.0000 EA 1.0000 BN 3.0000 PC		37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF	-30. 0. 50. 17.
1479 1473 1428 1365 1344	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166		1 1 1 1 1	4X4X08	-1.0000 BN 1.0000 EA 1.0000 BN 3.0000 PC 1.0000 EA		37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA	-30. 0. 50. 17. 38.
1479 1473 1428 1365 1344 1343	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166 02/21/2020 KE000000165		1 1 1 1 1 1	4X4X08	-1.0000 BN 1.0000 EA 1.0000 BN 3.0000 PC 1.0000 EA 1.0000 EA		37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA 38.4615 EA	-30. 0. 50. 17. 38. 38.
1479 1473 1428 1365 1344 1343 1342	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166 02/21/2020 KE000000165 02/21/2020 15YRSHINGLEBL		1 1 1 1 1 1 1	4X4X08	-1.0000 BN 1.0000 EA 1.0000 PN 3.0000 PC 1.0000 EA 1.0000 EA 1.0000 BN		37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA 38.4615 EA 50.2312 BN	-30. 0. 50. 17. 38. 38. 50.
1479 1473 1428 1365 1344 1343 1342 1341	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166 02/21/2020 KE000000165 02/21/2020 SYRSHINGLEBL 02/21/2020 KE000000164		1 1 1 1 1 1 1 1 1		-1.0000 BN 1.0000 EA 1.0000 BN 3.0000 PC 1.0000 EA 1.0000 EA 1.0000 BN 1.0000 EA	10	37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA 38.4615 EA 50.2312 BN 38.4615 EA	-30. 0. 50. 17. 38. 38. 50. 38.
1479 1473 1428 1365 1344 1343 1342 1341 1336	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166 02/21/2020 KE000000165 02/21/2020 15YRSHINGLEBL		1 1 1 1 1 1 1	4X4X08 2X4X10	-1.0000 BN 1.0000 EA 1.0000 PN 3.0000 PC 1.0000 EA 1.0000 EA 1.0000 BN	10	37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA 38.4615 EA 50.2312 BN 38.4615 EA	-30. 0. 50. 17. 38. 38. 50. 38.
1479 1473 1428 1365 1344 1343 1342 1341 1336	03/12/2020 30YRSHINGLEBL 03/11/2020 ZOTHER 03/02/2020 15YRSHINGLEBL 02/26/2020 HWL0404RG 02/21/2020 KE000000166 02/21/2020 KE000000165 02/21/2020 SYRSHINGLEBL 02/21/2020 KE000000164		1 1 1 1 1 1 1 1 1		-1.0000 BN 1.0000 EA 1.0000 BN 3.0000 PC 1.0000 EA 1.0000 EA 1.0000 BN 1.0000 EA	10	37.0370 BN 0.0000 EA 50.2312 BN 550.0000 MBF 38.4615 EA 38.4615 EA 50.2312 BN 38.4615 EA	-30. 0. 50. 17. 38. 38. 50. 38. 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.

-0

# **-**JMSi

	😕 🖪 (	9 <b>-</b> 4 0	- 1	-		50 Item Det			_			Sales Order - DMSi A	lgility™ [KEVINS	BRANCH] [v547 Dev	vel]
File	Sales C	Irder	Information	ı (	Go To	Actions									
	<b>S</b> .	<b>c</b> , 🕛	Messages	ŝŝ	<b>1</b>		🖗 Edit D	oispatch 1	🕨 🛐 Copy o	r Move SO	🔁 Credit Sales Or	der 🔌 Signature	📟 Cash	🕮 Reward Credit	
	_		SO Notes				🛞 View	Dispatch Addresse	s 🚺 Create	Quote/Cancel SO	Poc Storage	📋 Invoice SO	🔂 Check		
New . Order		dd CM Item		Order Totals	Charges and Costs	Shipment Information	📁 Relat	ed Transactions	Create	Quote/Retain SO	😢 Cancel Sales O	rder 🖶 Partial Invoio	e 🛛 📟 Credit Can	đ	
	Order	Actions				Order Re	view			Tra	nsaction Functions		Pa	yments	
SO ID					1960	Status					Branch	2KEVIN	•	Q	
Order (F	7) Payme	nts (F9) Pi	ck/Shipmer	nt (F11)											
Order I	nformatio	n: bw001 #	<b>#1, Build</b> e	rs Ware	house O	maha NE, Cus	tome <mark>r</mark> PC	):	_	_	_	_	_	_	
Item De	tail	_	_			_		_	_	_			_		
Line Ite	ms			_											
Tran sec			0	rdered q	ty Qty U	м		B/O qty	Price	Price UOM	Item message		WO ID/Tally UON	1 B/O information	B/O
1	15YRSH	INGLEBL			00 BN			0.0000	25.0000	BN					
l.															

#### **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.

	3日日 (100	ð 🗎 I 🕫		Li	ne Ite				S	ales Order - DMSi Agili	ty™ [KEVINS BR	ANCH] [v547 Devel]
File	Sales Order	Information	Go	To M	lanage							
	s, c, 📒	Messages	<b>\$</b> \$	<b>1</b>	2	에 Edit Dispatch	🚮 Copy o	r Move SO	Credit Sales Ord	er 🔌 Signature	📟 Cash	🕮 Reward Credit
		SO Notes		_		ি View Dispatch Addresse	s 🚺 Create	Quote/Cancel SO	🖫 Doc Storage	🛅 Invoice SO	📑 Chedk	
	ld SO Add CM tem Item			Charges nd Costs	1	🛯 🖆 Related Transactions	Create	Quote/Retain SO	😵 Cancel Sales Ord	ler 🖶 Partial Invoice	Credit Card	
	Order Actions				order R	eview		Trar	nsaction Functions		Pay	ments
SO ID			1	960	Status				Branch	2KEVIN	<b>▼</b> <i>≸</i>	>
Order (F7)	Payments (F9) F	Pick/Shipment	t (F11)									
order Info	prmation: bw001	#1, Builder	rs Wareh	ouse Oma	ha NE, Cu	stomer PO:	_	_	_	_	_	_
tem Deta	nil	_	_	_	_		_	_			_	
ine Item	s		_		_							
Tran seq	Item	On	dered qty	Qty UOM		B/O qty	Price	Price UOM	Item message	١	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 Iransac	tions - DMSi Agility	y <sup>™</sup> [KEVINS	S BRANCH] [v547 De	evel]							-		×
File	e Edit Options V	Window Go To Help	þ											
R	elated Transa	ctions												
							-							
	Branch ID	Tran type	Tran ID	Cust/Supplier ID	Seg #	Name	City	State	Addtl items	exist Stat	us	Rema	n expecte	dsc
=-	Branch ID 2KEVIN	Tran type PO		Cust/Supplier ID BLS001	Seq # 1	Name Brothers Lumbe	City Omaha	State NE	Addtlitems	exist Stat		Rema	n expecte	dscł
=-		PO		BLS001	Seq # 1 Quantity UOM		Omaha	NE	Addtl items				n expecte City	dsch
=-	2KEVIN	PO Transfer	1177	BLS001	1 Quantity UOM	Brothers Lumbe	Omaha PO/Reman exp	NE		Оре	en			dscł
	2KEVIN Item	PO Transfer	1177	BLS001 Quantity	1 Quantity UOM	Brothers Lumbe Expect date	Omaha PO/Reman exp	NE Dect date C		Оре	en			dsc

-0

## 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.

	eep Open 👩								
S C Move Up Prefinish Assignment Price and Cost *									
Move Down     Work Down     Order Processing      Outstaning     Salat Exact									
Item Item Line Item Actions Line Item Options Grid Options									
SO ID 1960 Status Branch 2KEVIN V	Iter								
Order (F7) Payments (F9) Pick/Shipment (F11)	n Attr								
Order Information: bw001 #1, Builders Warehouse Omaha NE, Customer PO:	>>>								
Item Detail	Item Attribute Search								
Line Items									
	Item Locator Customer Item Quicklist								
Click directly on the Line Items									
black bar heading									
	ier Ite								
	in Q								
	cklist								
Order Totals: Order total: 26.76, GN: 11.00, GM %: 44.00, Weight: 10.00	*								

# 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.

Soles Order - DMSI Agilty ** [KEVINS BRANCH] [v547 Deve]							– 🗆 X		
File Sa	ales Order Informati	on Go To	Actions						i 🔲 Keep Open 😨
S. G	b 😱 🧔 🗄	🖹 🔌		📃 Item Message	📴 Add Non-Stock Item	Price and Cost			
		_		💶 Price/Discount Adjustment	Display Cut File	Order Processing •			
Add SO Add Item Iter		rder Set Fillfrom story Source	Stock Specify Status Commit/Unco	mmit 🛛 😽 Price and Misc Cost Info	🐻 View/Edit W/O Status Info	🍥 Miscellaneous 🔻			
	SO Item Actions			SO Item Review		SO Item Options			
SO ID		1960	Status		Branch	2KEVIN	<b>~</b> <i>P</i>		Item
Order (F7) Pa	ayments (F9) Pick/Shipm	ent (F11)							Att
Order Inform	nation: bw001 #1, Buik	lers Warehouse O	)maha NE, Customer P	20:					≫ bute
Item Detail									Attribute Search
Item	15YRSHINGLEBL	2	Discount	No Discount	Dimension		٩		<u>+</u> _
Ordered		1.0000 BN	Ext weight	10.00 Ext load	10.00 Size				Ī
Price		25.0000 BN			Item desc	15 YR SHINGLE BLAC	к		Item Locator
Ext price		25.00						Item message	III ator
Net price		25.0000			PO	_	1.0000		
					10		1.0000		Custo
Available qty		976.5000 💑							
4									Customer Item Qu
									2

	) 🖻 🖬 🔒 • 🛱 🗞 [		50 Item Det						
	0.00		So Item Det						
File									
	New Order	Ctrl+N	Recent Sales Orders						
			-	<u>1</u> 1960 2KEVIN - Builders Warehouse Omaha NE 2 1958 2KEVIN - Builders Warehouse Omaha NE					
	Open Order	Ctrl+0	-	ilders Warehouse Omaha NE					
			—	ilders Warehouse Omaha NE					
	Save Order	Ctrl+S	-	ilders Warehouse Omaha NE					
	Drint		6 1423 BEATRICE - I	Kevin's Branch ilders Warehouse Omaha NE					
	Print	•	8 1422 BEATRICE - I						
	Print Preview	•	—	ilders Warehouse Omaha NE					
	Register Point of Sale	(POS)							
	Toggle POS mode on/off	for Sales Order Entry.							
	Show Cost	Ctrl+F2							
	Toggle on/off to display of	cost related fields.							
C Quera C Quera C Quera	Options								
	<u>C</u> lose								
			luser Preferences	🖧 Switch User  🞧 Exit to I	Login				
tem Detail	15YRSHINGLEBL	Discount No Discount	Dimension	D Market	GM				
)rdered	1.0000 BN	Ext weight 10.00 Ext load	10.00 Size	Market					
rice	25.0000 BN	Cost	14.0000 A Item desc	15 YR SHINGLE BLACK Item me	essage				
bit price Net price	25.00	GM %	11.00 44.00 PO	1.0000					
vailable qty	976.5000 💑	Market cost	14.0000						

# 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.

	- 🛱 🗞 🗟 I =	Line It	e		Sal	les Order - D	MSi Agility™ [I	KEVINS BRANCH] [V	547 Devel]
File Sales Ord	Information	n Go To Manag	e						
👳 🔚 🌆	formation	🚑 Create New Customer		😭 Images	M		EDI Forms		🗟 Edit Layout < 1
- <u>_</u> <u>&amp;</u> N	otes	😰 Lien Information		🔧 Commit Information			🛃 Credit Stat		🔟 Select Layout 🔻
PO Credit Fields Inquiry 🛅 T	ax Resale Certificates	s 📄 Contacts	Signatures	Shipment Change History	Saved Viewers 🕶	Attribute Viewer	🚺 Misc Infor	Take a mation Tour	
	Customer			View	View	/ers	Misc	ellaneous	Customize
SO ID		1960	Status				Branch	2KEVIN	<b>→</b> <i>P</i>
Order (F7) Payments (F9) Pick/Shipment (F11)									
Order Information: bw001 #1, Builders Warehouse Omaha NE, Customer PO:									
Item Detail									

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.

nyUl Designer - DMSi Agility <sup>71</sup> [KEVINS BRANCH] [v547 Devel] X									
🗋 📲 🔁 🖬 🗙 🧊   Align Left — Align Right   司 🕂 山   今 山   今 Bring to Front 🗐 Send to Back   🛄 🚱									
Layout name KE SO Layout 🥥 Sele	Select Icon • Accessed by User • kerr	nmel 🔎 Branch <ali></ali>							
ction Order Information Show selected fields using the specified mode. Use the canvas below to arrange fields as desired.									
Add/Remove Fields	w field Name 🖉 🕅	Mode	-						
	Accepts backorder		Ξ						
		Editable							
		Editable							
	Address 3	- for 1.1							
		Editable							
	Auth to charge City, State, ZIP E	Editable							
	Contact DIY notify method								
			-						
	Contact mobile phone		-						
	Contact name		-						
	Contact phone								
	Country		-						
Customer ID 🖉 👂	Sale type	Sales agent 1							
Ship-to name	Customer PO	Sales agent 2							
Price level	Reference	Ship via							
Address 1	Expected delv 06/25/20	Tax code 🖉 🗭							
Address 2	Expected delv date override On hold	Payment terms p							
City, State, ZIP	Route ID								
Phone ( )	Expected ship 06/25/20 V	Taxable Full payment required Append to open transfer							
Created by	Sales agent 3	Ship complete							
Order date 06/25/20 🗸	Orig OA exp delv date 06/25/20 🗸	Priced pick & delivery Treat as pass-thru Create PO on save							

-0