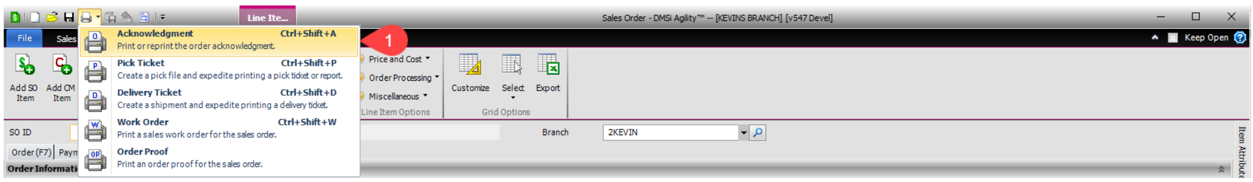
SALES ORDER ENTRY (DELIVERY) FAQS

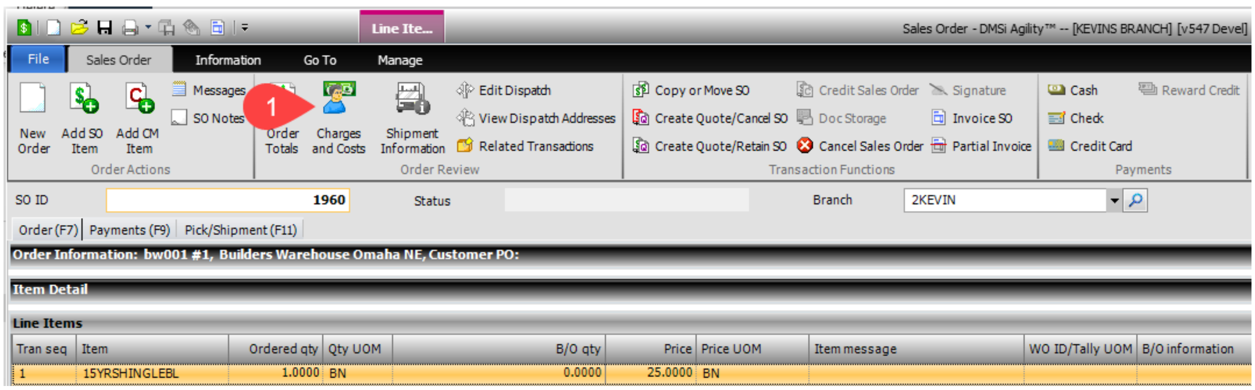
How do I print an Order Acknowledgement?

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.

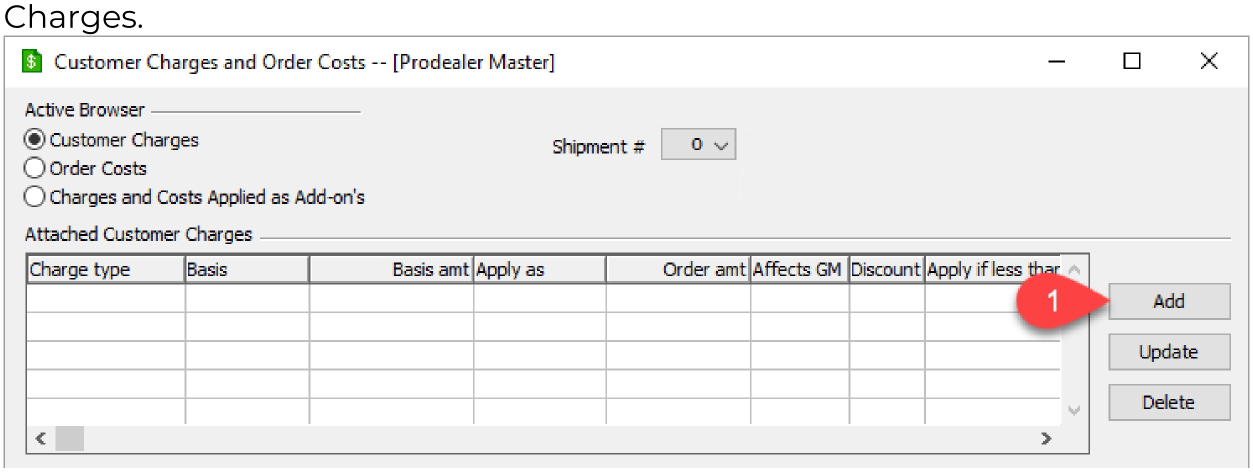


How do I add a Delivery Charge (or any charge)?

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

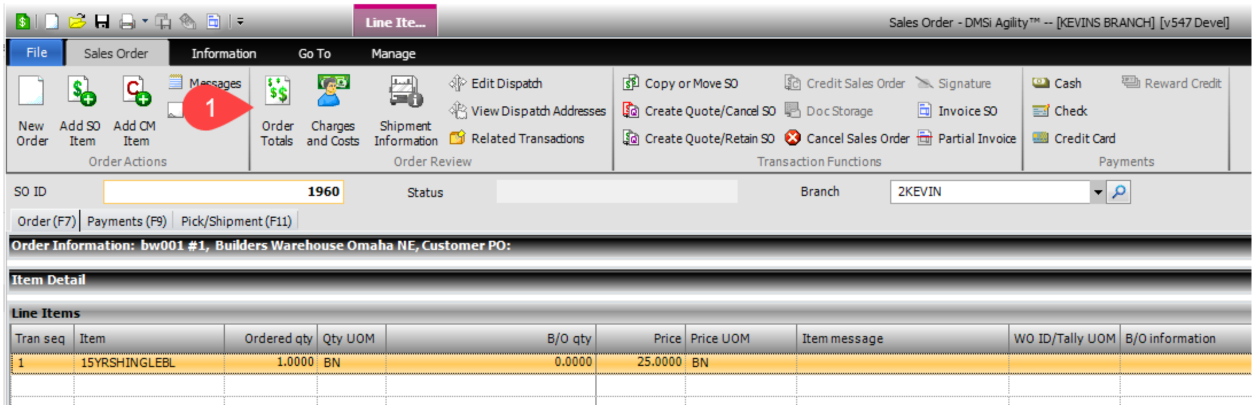


The following window will then allow you to select predefined Customer Charges.

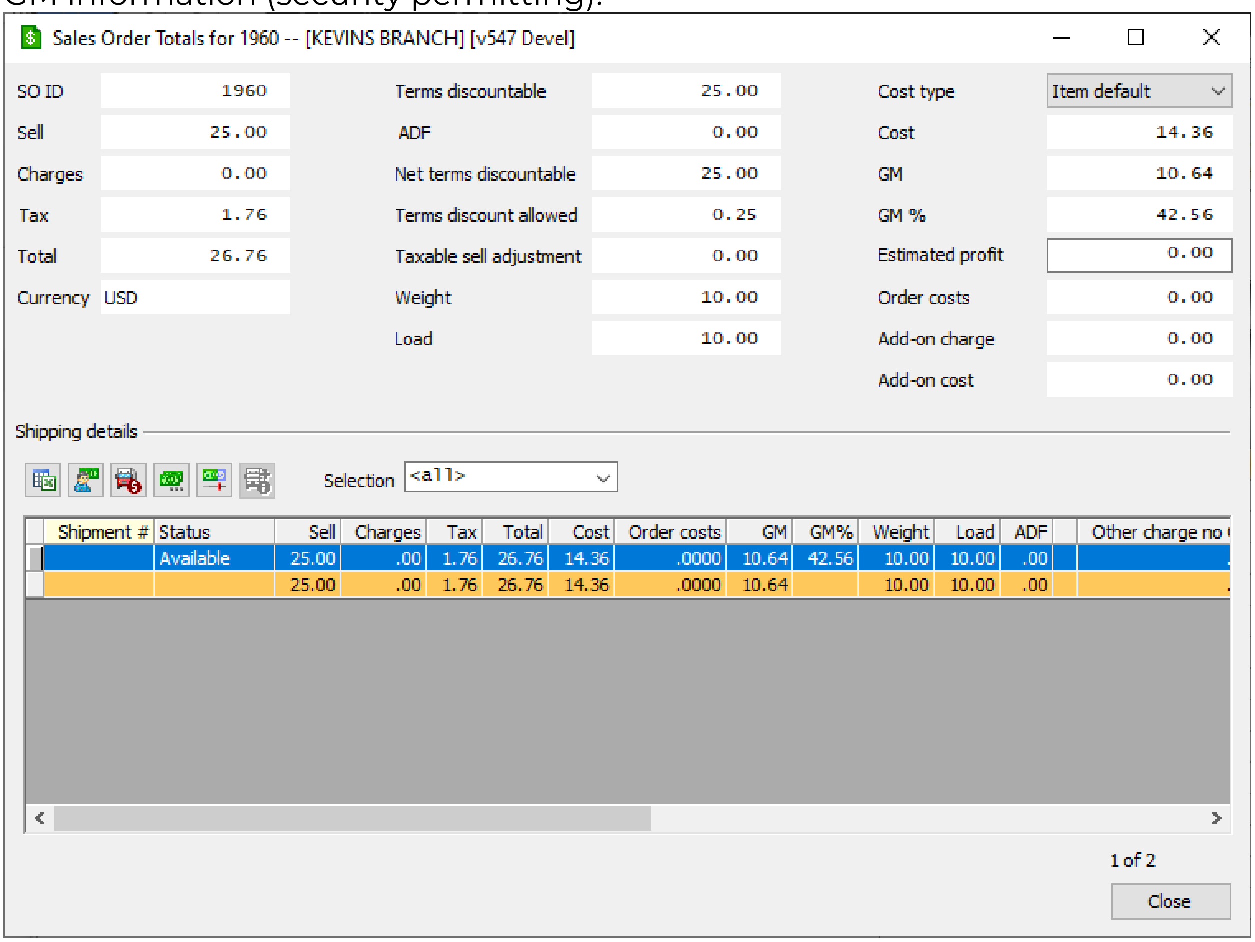


How can I review my order totals?

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

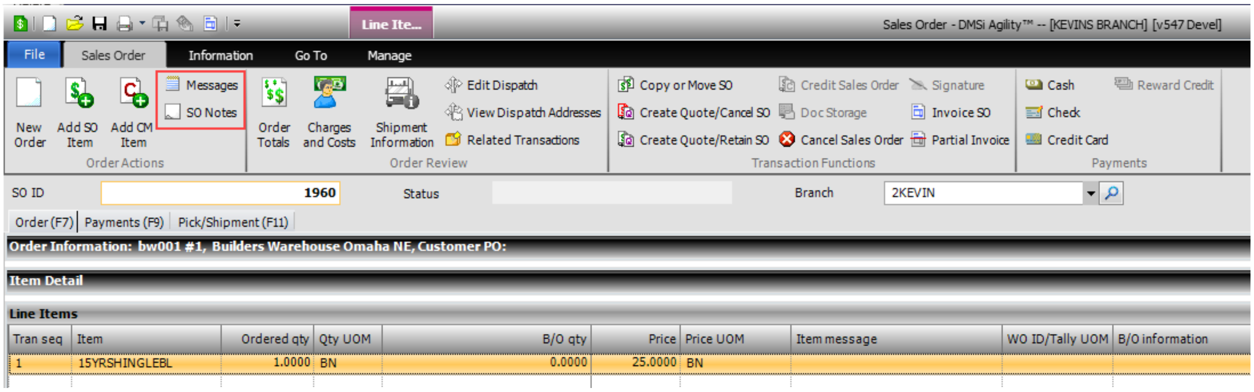


This will display totals including charges, tax amounts, discounts, weights and GM information (security permitting).



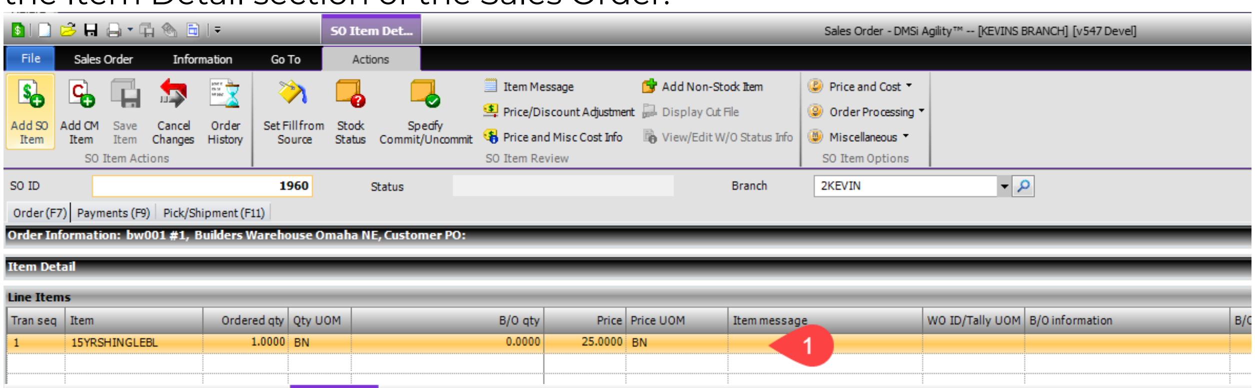
What is the difference between Messages and Notes?

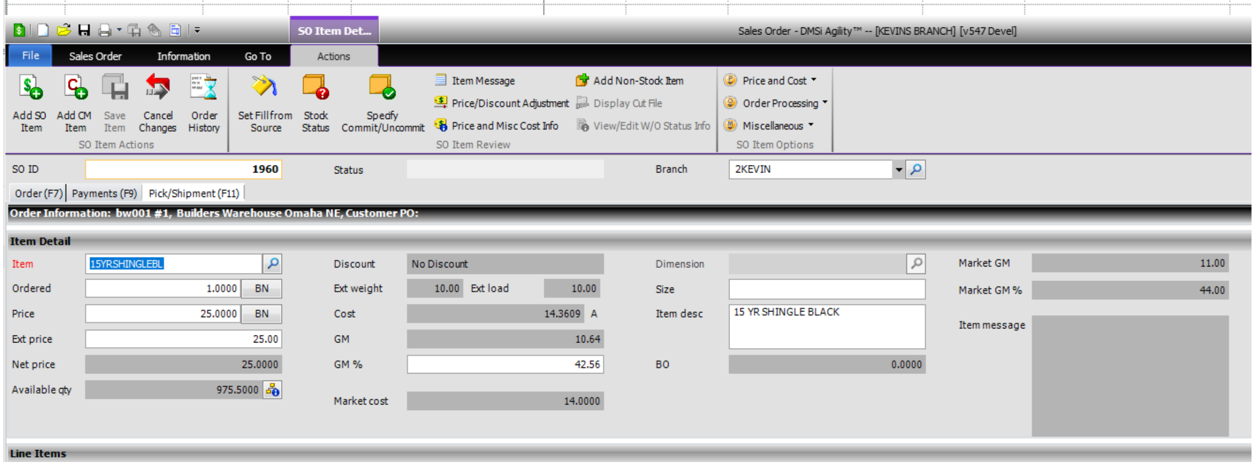
Messages will print on forms and can be used to provide instruction or specific information. Notes are strictly for internal use and will not be printed on forms.



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.

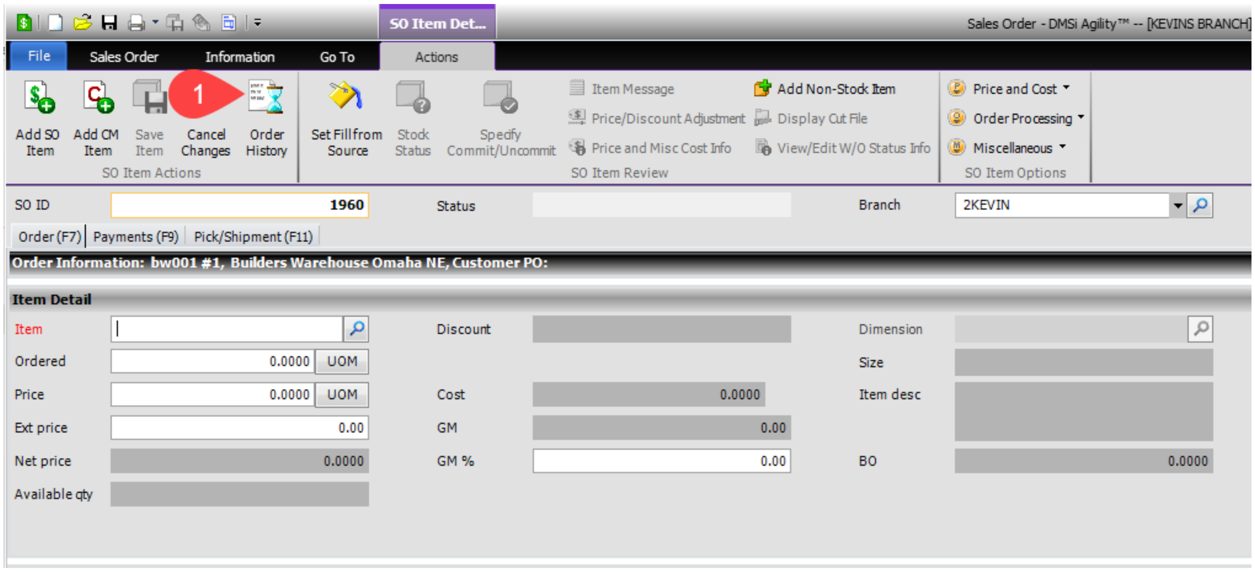




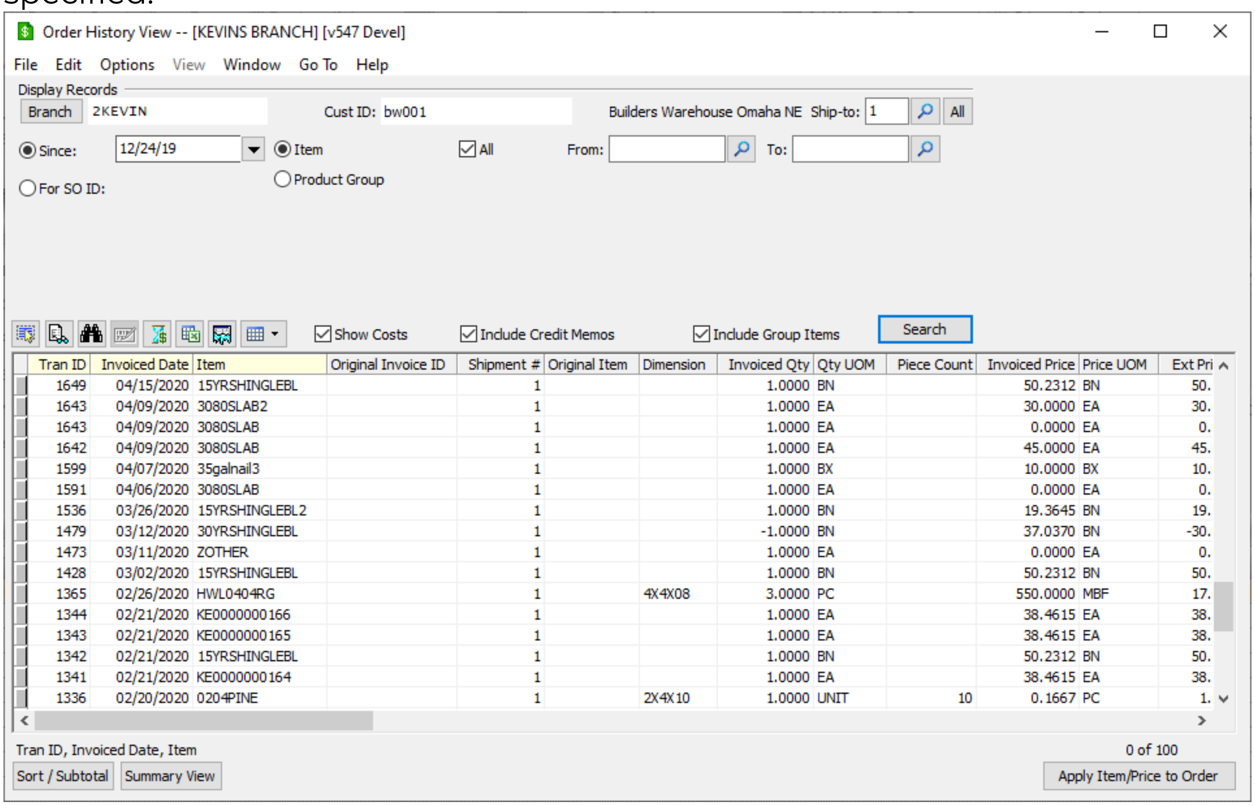
How can I see the Customer's order history?

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

Order Ribbon.

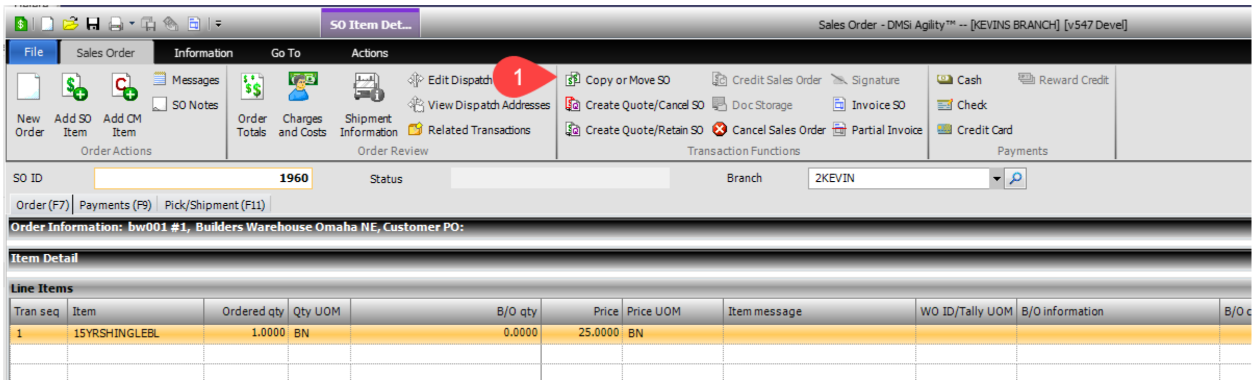


This will display any Items purchased by your Customer with the date range specified.



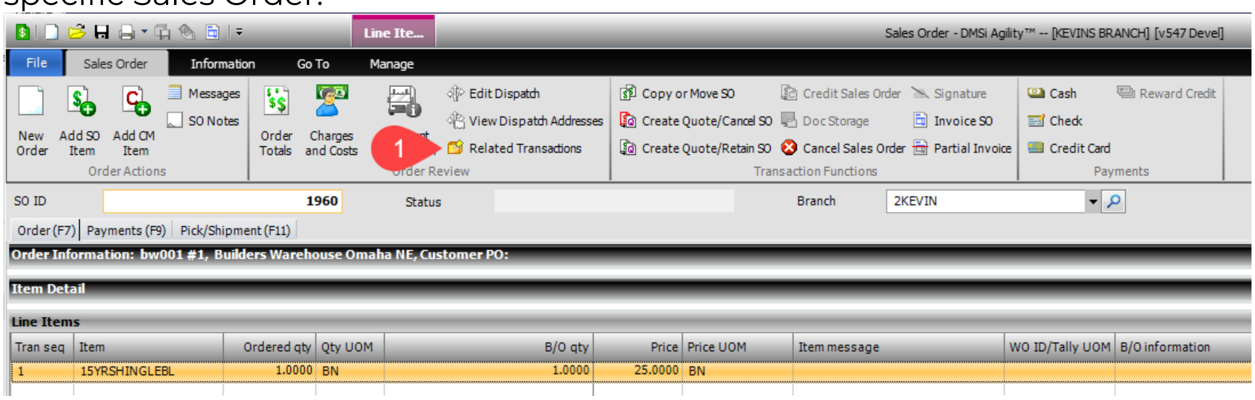
How can I copy an Order?

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

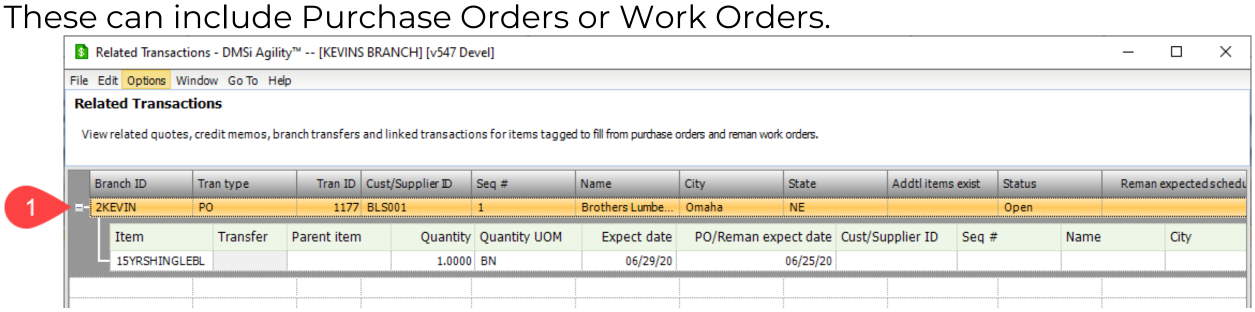


Can I see if my Sales Order is linked to another transaction?

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

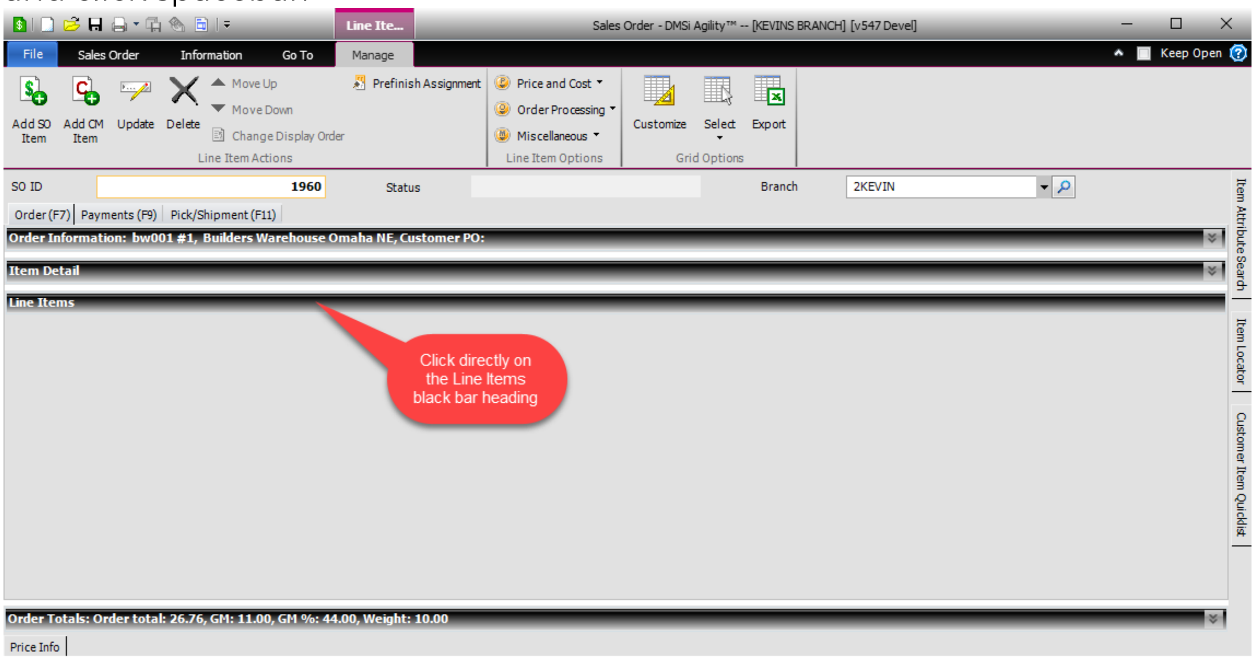


These can include Purchase Orders or Work Orders.



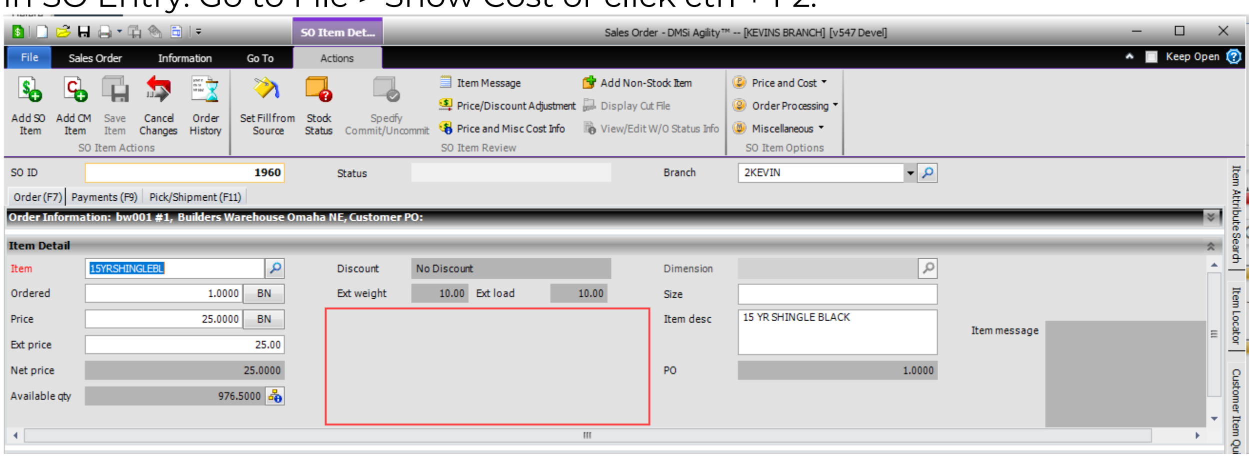
Why is the line items grid greyed out?

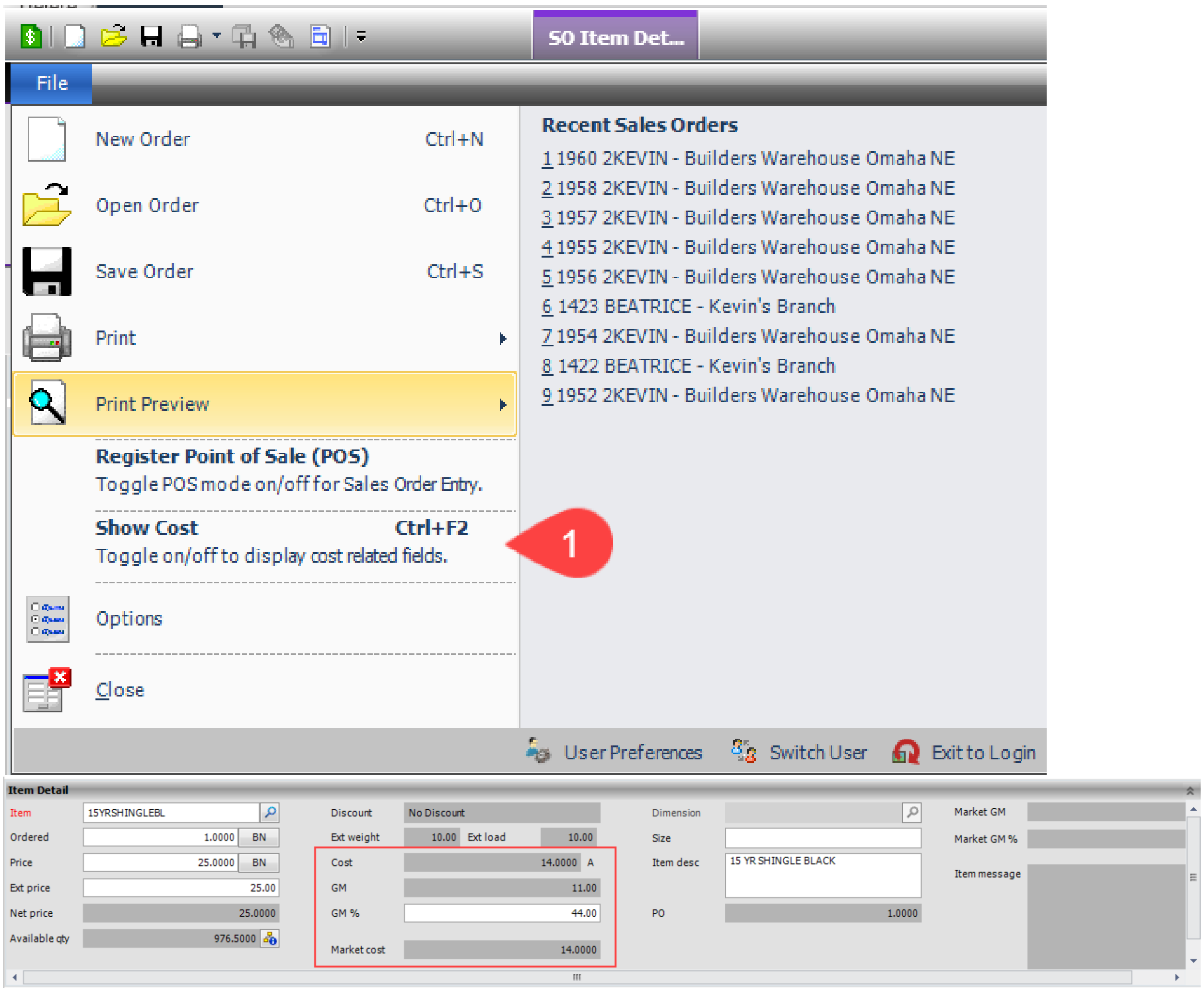
Your line item grids is all greyed out, you can't see any of the line items, and it looks like the window below. You will need to click on the line items heading and click spacebar.



Why is cost and/or gross margin not showing?

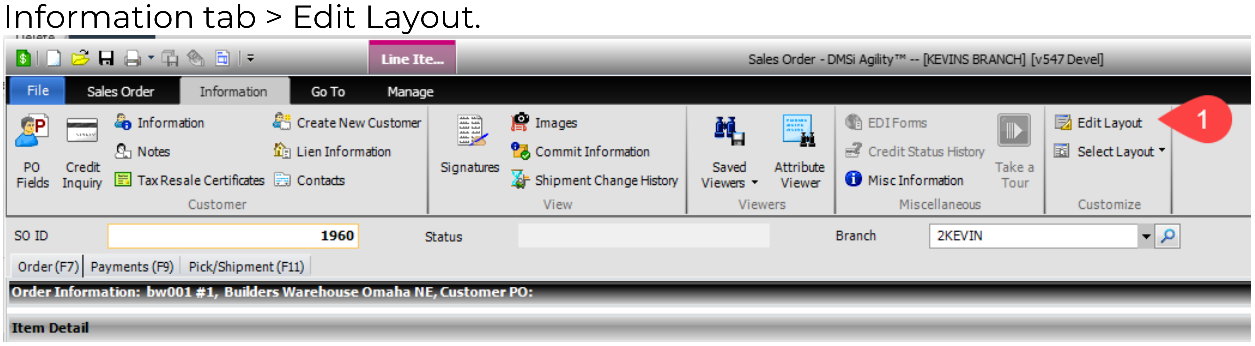
You have the security to view margins and costs, but they're not showing up in SO Entry. Go to File > Show Cost or click ctrl + F2.





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.