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.

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|---------------------------------|-----|---|--|-----------|---------------------|--------|---|---------------|----------------|
| File Sales | | Acknowledgment Ctrl+Shift+A Print or reprint the order acknowledgment. | | | | | | 🔺 🔳 Кеер Ор | ien 🕜 |
| s, c, | | Pick Ticket Ctrl+Shift+P Create a pick file and expedite printing a pick ticket or report. | Price and Cost * Order Processing * | | Ģ | × | | | |
| Add SO Add CM Item Item | | Delivery Ticket Ctrl+Shift+D Create a shipment and expedite printing a delivery ticket. | Miscellaneous | Customize | Select d Options | Export | | | |
| 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.

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|-----------|---------------------------|-------------------|---|--------------|--------------------------|------------|-----------------|-------------------|--------------------------|-----------------|--------------------|
| File | Sales Order Info | ormation G | бо То 🛛 🕅 | Manage | | | | | | | |
| | SL CL Mess | sages | | | 🖗 Edit Dispatch | 🚯 Copy o | r Move SO | Credit Sales Ord | ler 🔌 Signature | 📟 Cash | 🕮 Reward Credit |
| | | Votes | Channe and Annual | Chinese t | 😤 View Dispatch Addresse | s 🚺 Create | Quote/Cancel SO | 🖥 Doc Storage | 🛅 Invoice SO | 🔜 Check | |
| Order A | dd SO Add CM Item Item | Totals | and Costs | Information | 🖄 Related Transactions | 🚺 Create | Quote/Retain SO | 这 Cancel Sales Or | der 🖶 Partial Invoice | 📟 Credit Card | |
| | Order Actions | | | Order Rev | view | | Trans | action Functions | | Pay | rments |
| SO ID | | | 1960 | Status | | | | Branch | 2KEVIN | ~) | 0 |
| Order (F7 | 7) Payments (F9) Pick/S | Shipment (F11) | | | | | | | | | |
| Order In | formation: bw001 #1, | Builders Ware | house Oma | aha NE, Cust | ome r PO: | | | | | | |
| Item Det | ail | _ | _ | _ | | _ | _ | _ | _ | _ | _ |
| Line Iten | 15 | | | | | | | | | | |
| Tran seq | Item | Ordered qt | ty Qty UOM | | B/O qty | Price | Price UOM | Item message | | NO ID/Tally UOM | B/O information |
| 1 | 15YRSHINGLEBL | 1.000 | 00 BN | | 0.0000 | 25.0000 | BN | | | | |

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

| Customer Cł | arges and Orde | r Costs [Prodeale | er Master] | | | _ | | | |
|--|--|--------------------------------------|------------|-----------|---|---|--|--------|--|
| Active Browser — Customer Char Order Costs Charges and C Attached Custom | rges losts Applied as A er Charges | dd-on's | Shipme | ent # 0 ∨ | | | | | |
| Charge type | Basis | s and Order Costs [Prodealer Master] | | | | | | | |
| | | | | | | 1 | | Add | |
| | | | | | | | | Update | |
| | | | | | | | | Delete | |
| < | 1 | 1 | | 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.

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|-----------|-----------------|-----------------------|-------------|-------------|-------------|-------------------------|-------------|-----------------|--------------------|-----------------------|-------------------|--------------------|
| File | Sales Order | Informatio | n G | o To 🛛 🕅 | lanage | | | | | | | |
| | Sì Cì | Messages | 1 | 1 | 2 | P Edit Dispatch | 🚮 Copy o | r Move SO | Credit Sales On | der 🔌 Signature | 📟 Cash | 🕮 Reward Credit |
| | | | <u>•</u> •• | | (mg) | 🛞 View Dispatch Address | es 🚺 Create | Quote/Cancel SO | Poc Storage | 📋 Invoice SO | 🔜 Chedk | |
| Order / | Item Item | | Totals | and Costs 1 | Information | 📁 Related Transactions | 🕼 Create | Quote/Retain SO | 😣 Cancel Sales O | rder 🖶 Partial Invoid | æ 🛯 📟 Credit Card | |
| | Order Action | s | | | Order Re | eview | | Tran | nsaction Functions | | Pay | ments |
| SO ID | | | | 1960 | Status | 5 | | | Branch | 2KEVIN | - J | D |
| Order (F | 7) Payments (F9 |) Pick/Shipme | ent (F11) | | | | | | | | | |
| Order In | formation: bw | 001 #1 , Build | ers Ware | house Oma | ha NE, Cu | stome r PO: | | | | | | |
| Item De | tail | _ | _ | _ | _ | | _ | _ | _ | | _ | |
| Line Iter | ns | | _ | _ | _ | | | | | | | |
| Tran seq | Item | | Ordered qt | y Qty UOM | | B/O qty | Price | Price UOM | Item message | | WO ID/Tally UOM | B/O information |
| 1 | 15YRSHINGLE | BL | 1.000 | 0 BN | | 0.0000 | 25.0000 | BN | | | | |
| | | | | | | | | | | | | |

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 | ved | 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 | | | | | | | | | | | | | | |
| E | 🖷 🖷 🛱 | Se | lection <a< td=""><td>11></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% | Weight | Load | ADF | | Other cha | rge no (|
| | Available | 25.00 | .00 | 1.76 | 26.76 | 14.36 | .0000 | 10.64 | 42.56 | 10.00 | 10.00 | .00 | | | |
| | | | | | | | | | | | | | | | |
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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.

| | 3 H B • G € | s 🖬 I = | _ | L | ine Ite | _ | _ | _ | : | Sales Order - DMSi Agili | ty™ [KEVINS BR | RANCH] [v547 Devel] |
|------------|------------------------|--------------------|--------------|------------|---------------|--------------------------|------------|-----------------|--------------------|--------------------------|-----------------|---------------------|
| File | Sales Order | Information | n Go | о То | Manage | | | | | | | |
| | s. c. 🗆 | Messages | 5 | 6 2 | 2 | 예약 Edit Dispatch | 🛐 Copy o | r Move SO | Credit Sales Ord | der 🔌 Signature | 📟 Cash | Reward Credit |
| | | SO Notes | <u>ouder</u> | Channer | Chicago de la | 🔆 View Dispatch Addresse | s 🚺 Create | Quote/Cancel SO | 🖳 Doc Storage | 🛅 Invoice SO | 📑 Chedk | |
| Order I | item Item | | Totals a | and Costs | Information | 📁 Related Transactions | Create | Quote/Retain SO | 😢 Cancel Sales Or | der 🖶 Partial Invoice | 🔜 Credit Card | |
| | Order Actions | | | | Order Re | view | | Trar | nsaction Functions | | Pay | yments |
| SO ID | | | 1 | 1960 | Status | | | | Branch | 2KEVIN | • | ρ |
| Order (F7) |) Payments (F9) P | Pick/Shipmer | nt (F11) | | | | | | | | | |
| Order Info | ormation: bw001 | #1 , Builde | rs Wareh | iouse Oma | aha NE, Cus | tomer PO: | | | | | | |
| Item Deta | ail | _ | _ | _ | _ | | _ | _ | | | _ | |
| Line Item | s | | _ | _ | | | | | | | | |
| Tran seq | Item | 0 | rdered qty | Qty UOM | | B/O qty | Price | Price UOM | Item message | V | VO ID/Tally UOM | B/O information |
| 1 | 15YRSHINGLEBL | | 1.0000 | BN | | 0.0000 | 25.0000 | BN | | | | |
| | | | | | 1 | | | | | | | |

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.

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|--|---|---|--|
| File Sales Order Information Go To | Actions | | |
| 💽 🖪 🗖 🐜 📑 🚿 | T Item Me | essage 😚 Add Non-Stock Item | ② Price and Cost |
| | Price/D | is count Adjustment 🔐 Display Cut File | Order Processing |
| Item Item Item Changes History Source | n Stock Speary Status Commit/Uncommit 🚯 Price an | nd Misc Cost Info 🛛 🚯 View/Edit W/O Status Info | Miscellaneous * |
| SO Item Actions | SO Item Re | eview | SO Item Options |
| S0 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 U | JOM B/O qty | Price Price UOM Item messag | e WO ID/Tally UOM B/O information B/O |
| 1 15YRSHINGLEBL 1.0000 BN | 0.0000 | 25.0000 BN | 1 |
| | | | |
| SO 1 😕 🖬 🔒 * 🛱 🗞 🖻 1 🔻 😽 SO 1 | item Det | Sales Order - I | DMSi Agility™ [KEVINS BRANCH] [v547 Devel] |
| File Sales Order Information Go To | Actions | | |
| 🕵 🔂 🤜 📑 📎 🥫 | 📘 📃 🗐 Item Message | 付 Add Non-Stock Item 😢 Price and Cos | t • |
| Add SO Add CM Save Cancel Order Set Fillfrom Sto | Arice/Discount Adju | stment 📴 Display Cut File 🕘 Order Proces | sing * |
| Item Item Changes History Source Stat | tus Commit/Uncommit 🚯 Price and Misc Cost | Info B View/Edit W/O Status Info Wiscellaneous | |
| S0 ID 1960 | Status | Branch 2KEVIN | |
| Order (F7) Payments (F9) Pick/Shipment (F11) | 515165 | | |
| Order Information: bw001 #1, Builders Warehouse Omah | a NE, Customer PO: | | |
| Item Detail | | | |
| Item ISYRSHINGLEBL | Discount No Discount | Dimension | P Market GM 11.00 |
| Ordered 1.0000 BN | Ext weight 10.00 Ext load | 10.00 Size | Market GM % 44.00 |
| Price 25.0000 BN | Cost | 14.3609 A Item desc 15 YR SHINGLE | E BLACK Item message |
| Ext price 25.00 | GM | 10.64 | |
| Net price 25.0000 | GM % | 42.56 BO | 0.0000 |
| Available qty 975.5000 | Market cost | 14.0000 | |
| | | | |
| Line Items | | | |

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.

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|-----------|------------------------|--------------------------|---------------------------|------------------|------------------------|-----------------|-----------------------|------|---|------|---|---|-------------------------|
| File | Sales | Order | Infor | mation | Go To | Acti | ons | | | | | | |
| Add SO / | Add CM Item SO I | Save Item Item Act | Cancel Changes ions | Order History | Set Fillfrom Source | Stock Status | Spedfy Commit/Unco | mmit | Item Message Price/Discount Adjustment Price and Misc Cost Info SO Item Review | 📑 Ad | dd Non-Stock Item isplay Cut File ew/Edit W/O Status Info | Price and Cost Order Processing Miscellaneous SO Item Options | |
| SO ID | 0.0 | |) p:-l./cl | | 1960 | | Status | | | | Branch | ZKEVIN | ▼ > |
| Order Inf | ormatic | on: bw |) PICK/SF 001 #1, F | Builders V | 11) Varehouse O | maha N | E, Customer F | ю: | | - | | | |
| Item Det | ail | _ | _ | _ | _ | _ | _ | _ | | _ | | | |
| Item | 1 | | | | P | I | Discount | | | | Dimension | | P |
| Ordered | | | | 0.00 | NOU 00 | | | | | | Size | | |
| Price | | | | 0.00 | DO UOM | (| Cost | | 0.000 | 00 | Item desc | | |
| Ext price | | | | | 0.00 | (| GM | | | 0.00 | | | |
| Net price | | | | | 0.0000 | | GM % | | | 0.00 | во | | 0.0000 |
| Available | qty | | | | | | | | | | | | |
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This will display any Items purchased by your Customer with the date range specified.

| S Order H | listory View [KEVINS BRANG | CH] [v547 Devel] | | | | | | | - | |
|---------------|----------------------------|---------------------|--------------------|-----------------|-------------------|-----------|-----------|----------------|-----------|-----------|
| Diseless Date | options view window | do lo Tielp | | | | | | | | |
| Branch | 2KEVIN | Cust ID: bw001 | | Builders Warebo | ise Omaha NE -Sh | hin-to: 1 | | | | |
| branch | | 0000101 011001 | | | | | · · | | | |
| Since: | 12/24/19 | Item | All From | n: | 🔎 То: | | 2 | | | |
| | D: O | Product Group | | | | | | | | |
| 0101301 | υ. | | | | | | | | | |
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| 🇊 🔍 🕯 | 🕯 📨 ፮ 🛍 🖼 🎟 • | Show Costs | Include Credit Mer | mos 🗹 | Include Group Ite | ems S | Search | | | |
| Tran ID | Invoiced Date Item | Original Invoice ID | Shipment # Origina | Item Dimension | Invoiced Qty (| Qty UOM P | ece Count | Invoiced Price | Price UOM | Ext Pri 🔺 |
| 1649 | 04/15/2020 15YRSHINGLEBL | | 1 | | 1.0000 E | 3N | | 50.2312 | BN | 50. |
| 1643 | 04/09/2020 3080SLAB2 | | 1 | | 1.0000 E | EA | | 30.0000 | EA | 30. |
| 1643 | 04/09/2020 3080SLAB | | 1 | | 1.0000 E | EA | | 0.0000 | EA | 0. |
| 1642 | 04/09/2020 3080SLAB | | 1 | | 1.0000 E | A | | 45.0000 | EA | 45. |
| 1599 | 04/07/2020 35galnail3 | | 1 | | 1.0000 E | ЗX | | 10.0000 | BX | 10. |
| 1591 | 04/06/2020 3080SLAB | | 1 | | 1.0000 E | A | | 0.0000 | EA | 0. |
| 1536 | 03/26/2020 15YRSHINGLEBL | .2 | 1 | | 1.0000 E | BN | | 19.3645 | BN | 19. |
| 1479 | 03/12/2020 30YRSHINGLEBL | | 1 | | -1.0000 E | BN | | 37.0370 | BN | -30. |
| 1473 | 03/11/2020 ZOTHER | | 1 | | 1.0000 E | EA | | 0.0000 | EA | 0. |
| 1428 | 03/02/2020 15YRSHINGLEBL | - | 1 | | 1.0000 E | BN | | 50.2312 | BN | 50. |
| 1365 | 02/26/2020 HWL0404RG | | 1 | 4X4X08 | 3.0000 F | PC | | 550.0000 | MBF | 17. |
| 1344 | 02/21/2020 KE000000166 | | 1 | | 1.0000 E | A | | 38.4615 | EA | 38. |
| 1343 | 02/21/2020 KE000000165 | | 1 | | 1.0000 E | A | | 38.4615 | EA | 38. |
| 1342 | 02/21/2020 15YRSHINGLEBL | - | 1 | | 1.0000 E | BN | | 50.2312 | BN | 50. |
| 1341 | 02/21/2020 KE000000164 | | 1 | | 1.0000 E | EA | | 38.4615 | EA | 38. |
| 1336 | 02/20/2020 0204PINE | | 1 | 2X4X10 | 1.0000 L | JNIT | 10 | 0.1667 | PC | 1. v |
| < | | | | | | | | | | > |
| 1 | | | | | | | | | | |
| Tran ID, Inv | oiced Date, Item | | | | | | | | 0 of | 100 |

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.

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|-----------|----------------|----------------|-------------|----------------------|--------------|--------------------------|-------------|-----------------|-------------------|---------------------------------|-----------------|--------------------|-------|
| File | Sales Order | Informatio | n Go | оТо | Actions | | | | | | | | |
| | SL CL | Messages | 50 | 1 | | 🚸 Edit Dispatch 🚺 | 🕨 🛐 Copy o | r Move SO | Credit Sales On | der l Signature | 📟 Cash | 🕾 Reward Credit | |
| | | SO Notes | | - | - Contra | 🕆 View Dispatch Addresse | es 🚺 Create | Quote/Cancel SO | 📳 Doc Storage | 📋 Invoice SO | 🖬 Check | | |
| Order A | Item Item | | Totals a | Charges and Costs | Information | 📁 Related Transactions | Create | Quote/Retain SO | 🙆 Cancel Sales O | rder <u>च</u> ि Partial Invoice | e 🔤 Credit Card | | |
| | Order Action | Order Actions | | | Order Re | view | | Tran | saction Functions | | Pay | rments | |
| SO ID | | | : | 1960 | Status | | | | Branch | 2KEVIN | •) | 0 | |
| Order (F | 7) Payments (F | 9) Pick/Shipme | ent (F11) | | | | | | | | | | |
| Order In | formation: by | /001 #1, Build | ers Warel | iouse On | naha NE, Cus | tomer PO: | | | | | | | |
| Item De | tail | _ | | | _ | | _ | _ | _ | | _ | _ | |
| Line Iter | ns | _ | _ | _ | _ | | _ | _ | _ | | _ | | |
| Tran seq | Item | 0 | Ordered qty | Qty UO | M | B/O qty | Price | Price UOM | Item message | | WO ID/Tally UOM | B/O information | B/O c |
| 1 | 15YRSHINGL | EBL | 1.000 | 0 BN | | 0.0000 | 25.0000 | BN | | | | | |
| | | | | | | | | | | | | | |
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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.

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|-------------------|---------------------------|--------------|-------------------|----------------------|-----------|--------------------------|------------|-----------------|-------------------|-------------------------|-----------------|--------------------|---|
| File | Sales Order | Informatio | n Go | то М | lanage | | | | | | | | |
| | SL CL | Messages | See. | 1 | | ୍ଭିତ Edit Dispatch | 👔 Copy o | r Move SO | Credit Sales Ord | ler 🔌 Signature | 📟 Cash | 🕮 Reward Credit | |
| | 0 0 | SO Notes | | | 000 | 🛞 View Dispatch Addresse | s 🚺 Create | Quote/Cancel SO | 🖫 Doc Storage | 🗐 Invoice SO | 📑 Chedk | | |
| New Ad Order I | id SO Add CM Item Item | | Order Totals a | Charges ind Costs | 1 | 🖻 🖄 Related Transactions | Create | Quote/Retain SO | 😣 Cancel Sales Or | der 🖶 Partial Invoice | e 🔜 Credit Card | | |
| | Order Actions | | | | order R | eview | | Tran | saction Functions | | Pay | ments | |
| SO ID | | | 1 | 1960 | Status | s | | | Branch | 2KEVIN | ~) | D | |
| Order (F7) |) Payments (F9) | Pick/Shipme | ent (F11) | | | | | | | | | | |
| Order Inf | ormation: bw0 | 01 #1, Build | ers Wareh | iouse Oma | ha NE, Cu | stomer PO: | _ | _ | _ | _ | _ | _ | |
| Item Deta | ail | _ | _ | _ | _ | | _ | | | | | | _ |
| Line Item | IS | | _ | _ | _ | | | | | | | | _ |
| Tran seq | Item | (| Ordered qty | Qty UOM | | B/O qty | Price | Price UOM | Item message | | WO ID/Tally UOM | B/O information | |
| 1 | 15YRSHINGLEE | 3L | 1.0000 | BN | | 1.0000 | 25.0000 | BN | | | | | |
| | | | | | | | | | | | | | |

These can include Purchase Orders or Work Orders.

| S F | Related | d Transactio | ons - DMSi Agilit | y™ [KEVIN | S BRANCH] [v547 De | vel] | | | | | | | | - | | × |
|------------|-----------|-----------------|-------------------|----------------|-----------------------|----------------------|---------------------------|-----------------------|----------------------|------------------|-------|--------|------|--------|----------|--------|
| File i | Edit C | ptions Win | dow Go To He | р | | | | | | | | | | | | |
| Rela | ated | Transacti | ons | | | | | | | | | | | | | |
| Vie | w relat | ted quotes, | credit memos, br | anch transfers | and linked transactio | ons for items tagged | d to fill from purchase o | orders and reman work | orders. | Addtl items | evict | Statue | | Peman | evnerter | dsched |
| | 2KEVIN | N | PO | 1177 | BLS001 | 1 | Brothers Lumbe | Omaha | NE | Additions | CAISE | Open | | Kennan | capetter | asened |
| Am | Ite 15 | m /RSHINGLEE | Transfer 3L | Parent item | Quantity 1.0000 | Quantity UOM BN | Expect date 06/29/20 | PO/Reman exp | ect date 06/25/20 | Cust/Supplier ID | Seq # | | Name | | City | |
| | | | | | | | | | | | | | | | | |

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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.

| ■ □ 22 H ⊕ * 4 % B = | Line Ite | Sales | Order - DMSi A | lgility™ [KEV] | NS BRANCH] [v547 Devel] | | – 🗆 X | |
|---|------------------------|----------------------------------|----------------|----------------|-------------------------|-----|-----------------|--|
| File Sales Order Information Go To | Manage | | | | | | 🔺 🔲 Keep Open 😨 | |
| 🕵 🖳 🚧 🖌 📥 Move Up | 🖉 Prefinish Assignment | Price and Cost • | | | | | | |
| Add SO Add CM Update Delete | | Order Processing | Customize | Select Expo | f | | | |
| Item Item El Change Display Ord Line Item Actions | er | Miscellaneous Line Item Options | Grid | • Options | | | | |
| S0 ID 1960 | Status | | | Bra | nch 2KEVIN | - ₽ | Iter | |
| Order (F7) Payments (F9) Pick/Shipment (F11) | | | | | | | n Attr | |
| Order Information: bw001 #1, Builders Warehouse C | maha NE, Customer PO: | | | | | | * | |
| Item Detail | | | | | | | i≊ardı | |
| Line Items | | | _ | _ | | | | |
| | | | | | | | tem Lo | |
| Click directly on the Line Items | | | | | | | | |
| | black bar | heading | | | | | _ | |
| | | | | | | | iustom | |
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| | | | | | | | cki ist | |
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| | | | | | | | | |
| Order Totals: Order total: 26.76, GM: 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.

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|------------------------|-------------------|-------------------|------------------|------------------------|---------|-------------|-----------------|--------------------------|----------|-----------------------------|--------------------------------|-------------------|---------------|---|----|-----------|----------|
| File Sa | ales Order | Infor | nation | Go To | Acti | ons | | | | | | | | ^ | Ke | ep Open | (?) |
| S. C | | | nu 🕁 | >> | | | . 1 | 📃 Item Message | 📑 A | dd Non-Stock Item | 🙆 Price and Cost 🔻 | | | | | | |
| -0 -0 | | | | | -0 | -0 | | 획 Price/Discount Adjust | ment 🔜 D | isplay Cut File | 🥝 Order Processing 🔻 | | | | | | |
| Add SO Add Item Ite | CM Save m Item | Cancel Changes | Order History | Set Fillfrom Source | Stock | Commit/Un | y I commit 👎 | 😽 Price and Misc Cost In | fo 🛯 🐻 V | iew/Edit W/O Status Info | 🕘 Miscellaneous 🝷 | | | | | | |
| | SO Item Acti | ons | | | | | | SO Item Review | | | SO Item Options | | | | | | |
| SO ID | | | | 1960 | : | Status | | | | Branch | 2KEVIN | ▼ <i>P</i> | | | | | Iten |
| Order (F7) P | ayments (F9) | Pick/Sh | ipment (F | 11) | | | | | | | | | | | | | Attr |
| Order Inform | nation: bw0 | 001 #1, E | uilders V | /arehouse 0 | maha Ni | E, Customer | r PO: | | - | | | | | _ | - | \approx | bute |
| Item Detail | | | - | | - | | - | | | | | | | | - | * | Searc |
| Item | 15YRSHIN | GLEBL | | 2 | 1 | Discount | No Di | iscount | | Dimension | | P | | | | - | <u> </u> |
| Ordered | | | 1.000 | 00 BN | | Ext weight | 1 | 10.00 Ext load | 10.00 | Size | | | | | | | Iten |
| Price | | | 25.000 | 00 BN | Г | | | | | Item desc | 15 YR SHINGLE BLAC | к | Itom monstage | | | | Loca |
| Ext price | | | | 25.00 | | | | | | | | | item message | | | E | tor |
| Net price | | | | 25.0000 | | | | | | PO | | 1.0000 | | | | | 6 |
| Available qty | | | 97 | 6.5000 💑 | | | | | | | | | | | | | stom |
| | | | | | | | | | | | | | | | | - | er Ite |
| • | | | | | | | | | 111 | | | | | | | • | P |

| SO Item Det | |
|--|-------------|
| File | |
| New Order Ctrl+N Recent Sales Orders 11960 2KEVIN - Builders Warehouse Omaha NE | |
| Open Order Ctrl+O 21958 2KEVIN - Builders Warehouse Omaha NE 31957 2KEVIN - Builders Warehouse Omaha NE | |
| Save Order Ctrl+S 41955 2KEVIN - Builders Warehouse Omaha NE 51956 2KEVIN - Builders Warehouse Omaha NE 6 1423 BEATRICE - Kevin's Branch | |
| Print Print Z1954 2KEVIN - Builders Warehouse Omaha NE 8 1422 BEATRICE - Kevin's Branch | |
| Print Preview 91952 2KEVIN - Builders 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 cost related fields. | |
| Options Options | |
| Close | |
| a User Preferences 👫 Switch User 🔬 Exit | to Login |
| em Detail | |
| em 15YRSHINGLEBL P Discourt Dimension P M | larket GM |
| rdered 1.0000 BN Ext weight 10.00 Ext load 10.00 Size M. | larket GM % |
| ace 25.0000 8N Cost 14.0000 A Item desc 15 YR SHINGLE BLACK It | em message |
| et price 25.000 GM % 44.00 PO 1.0000 | |
| valiable dy 976.5000 🖧 Market cart 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.

| 🛐 🗋 😕 🗔 | _ • ⊈ ⊗ ⊡ • | Line It | e | | Sal | les Order - D | DMSi Agility™ [KEVINS BRANCH] [\ | v547 Devel] |
|--|--|---------------------|------------|--|----------------------------|-----------------------------|---|-------------|
| File Sale | s Order Information | n Go To Manag | e | | | | | |
| PO Credit Fields Inquiry | Information Notes Tax Resale Certificates Customer | Create New Customer | Signatures | Images Commit Information Shipment Change History View | Saved Viewers - View | Attribute Viewer vers | EDIForms Credit Status History Misc Information Miscellaneous | Edit Layout |
| 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 | | | | | | | | |

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.

| 📮 myUl Designer - DMSi Agility" [KEVINS BRANCH] [v547 Devel] X | | | | | | | | |
|--|---|---|----------|--|--|--|--|--|
| 🗋 📲 😼 🖬 🗙 🦈 📔 Align Left 🛛 Align Right 🗍 과 🕮 🍐 🖗 Sring to Front 🗐 Send to Back 📔 🗃 🚱 | | | | | | | | |
| Layout name KE SO Layout | Select Icon Accessed by User User | kemmel 👂 Branch <ali></ali> | | | | | | |
| Section Order Information | Show selected fields using the specified mode. Use the canvas | below to arrange fields as desired. | | | | | | |
| Add/Remove Fields | Show field Name | Mode | ^ | | | | | |
| | Accepts backorder | Randsorly | E | | | | | |
| Adjust Tab Order | Address 1 | Editable | | | | | | |
| Set Section Properties | Address 2 | Editable | | | | | | |
| | Address 3 | | | | | | | |
| | Append to open transfer | | | | | | | |
| | City State ZIP | Editable | | | | | | |
| | Contact DIY notify method | | | | | | | |
| | Contact email | | | | | | | |
| | Contact mobile phone | | | | | | | |
| | Contact name | | | | | | | |
| | Contact phone | | | | | | | |
| | Country | | • | | | | | |
| | | | | | | | | |
| Customer ID | Sale type | Sales agent 1 Currency | | | | | | |
| 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 | P Freight terms P | | | | | | |
| Phone () | Expected ship date 06/25/20 | Taxable Full payment required Append to open transfer | | | | | | |
| Created by | Sales agent 3 | ✓ Ship complete d Accepts backorder o 0 0 0 0 | | | | | | |
| Order date 06/25/20 🗸 | Orig OA exp delv date 06/25/20 | Priced pick & delivery Treat as pass-thru Create PO on save | | | | | | |
| | | | | | | | | |

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