UC103-Order Entry 1 Agenda

Course Presenter: Tim Chaffin

Course Description

This course will cover the basic user-side of 'Order Entry' (both Window and Glass customers)

Business Case

As a… Customer Service Representative
I want to… enter and manage quotes and orders
So I can ….increase company sales and revenue.

Key Benefits

Easy to use and highly configurable. Allows customers to enter and track orders easily and quickly.

Functional Walkthrough

- Order Entry Icons
  - Navigation arrows
  - Add & delete icons
  - Copy
  - Find
  - Print and Preview
  - Acknowledge & Auto
  - Global Options Changes
  - Attachments
  - Permission
  - View Transaction log

- Column Manager
  - Add
  - Remove
  - Bold Columns
  - Restore Defaults
  - Pin

- Carry Down
- Navigation
- Line Item Right click options
  - Copy Item
  - Past Item at End
  - Paste Special
  - Move Item
  - Import Item
  - Export Item
  - View Multiple Shipments
  - Part Breakdown
  - Cost Breakdown
  - Save As (Customer & System Shortcut)

- Comments
  - Line item
  - Order

- Order Status
  - On Hold
  - Available
  - Released
  - Finalized
  - Closed

- Order Entry tabs
  - Order
  - Shipping
  - Financial
  - General

- Price Breakdown and Item Cost Breakdown
- Order Entry Hot Keys

Tips

To manually enter a Fax Number or Email Address when you acknowledge an order, choose the green check mark icon from the Order Entry screen. Select Fax or Email. Hold down the Shift key from the Keyboard and then select the OK button. A dialog box will be returned and you can enter the fax number or email address here.