Cybex Systems

Enterprise Retail Solutions

Order Entry

User Manual

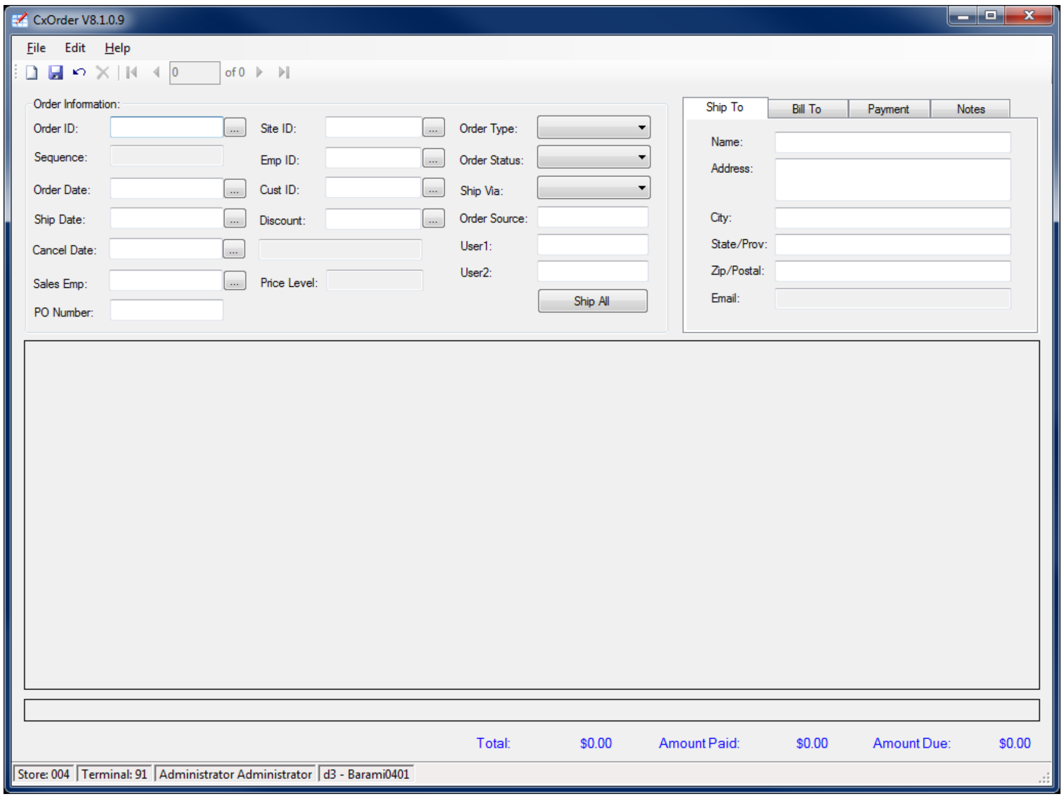
Contents

Order Entry

The *Order Entry* screen consists of six key areas: *Order Information*, *Ship to*, *Bill To*,*Payments*,*Notes,* and *Items*.

Understanding the Order Information screen

The *Order Information* section is used to enter the order header and customer information for each order.



Order ID An alphanumerical identifier that represents the order. Do not fill this number in; the *OrderID* will be assigned for you. Once an order has been created, this is the number that can be used to locate it.

Sequence The *Sequence* for the order. The sequence starts off at 1. It is used to indicate the status of the order. Each time an order is changed, the sequence will move up 1. For example, if an order isn't completed because one of the items is on backorder, the sequence would change to 2 once you changed and saved the order.

Order Date The *Order Date* field contains the date on which the order was created. It will be automatically entered by the system with the current date.

Ship Date The date that the customer desires the contents of the order to be shipped by. The date is required to be in the mm/dd/yyyy format. Similar to other fields, if an invalid date is entered into the field, it will be flagged **RED**. This will automatically populate when the status has been changed to Shipped.

Cancel Date The date at which time the order will be cancelled if it has not been confirmed by that time. The date is required to be in the mm/dd/yyyy format. Similar to other fields, if an invalid date is entered into the field, it will be flagged **RED**. This is an optional field.

Sales Emp Indicates the salesperson that took the order. This may or may not be the employee who is processing the order themselves. This is an optional field.

PO Number The *PO Number* field exists so that the customer's purchase order number can be linked with the order being made. This is for the convenience of the customer, so that they can keep track of the orders they are making at their location. This is an optional field.

Site ID Contains the store's location code. This field is automatically filled from the CXBO setup properties that were set at the time of installation. It serves the purpose of being able to track where the order was processed/created.

Emp ID Used for the purpose of recording the individual entering the order. Sometimes the person who is placing the order may not be the individual listed as the contact for that customer, so it is important to be able to keep track of this information.

Cust ID A unique numerical identifier that is associated with each individual customer. Customers are maintained through the *Customer Management* system. After entering a *Customer ID* number, the remainder of the *Customer* fields are filled with the pertinent information from that customer's record. The *Customer ID* can be typed in manually. Or it can be selected from the customer search listing that is accessed by using the F3 key or clicking on the ellipsis button ... beside the field. This is a required field.

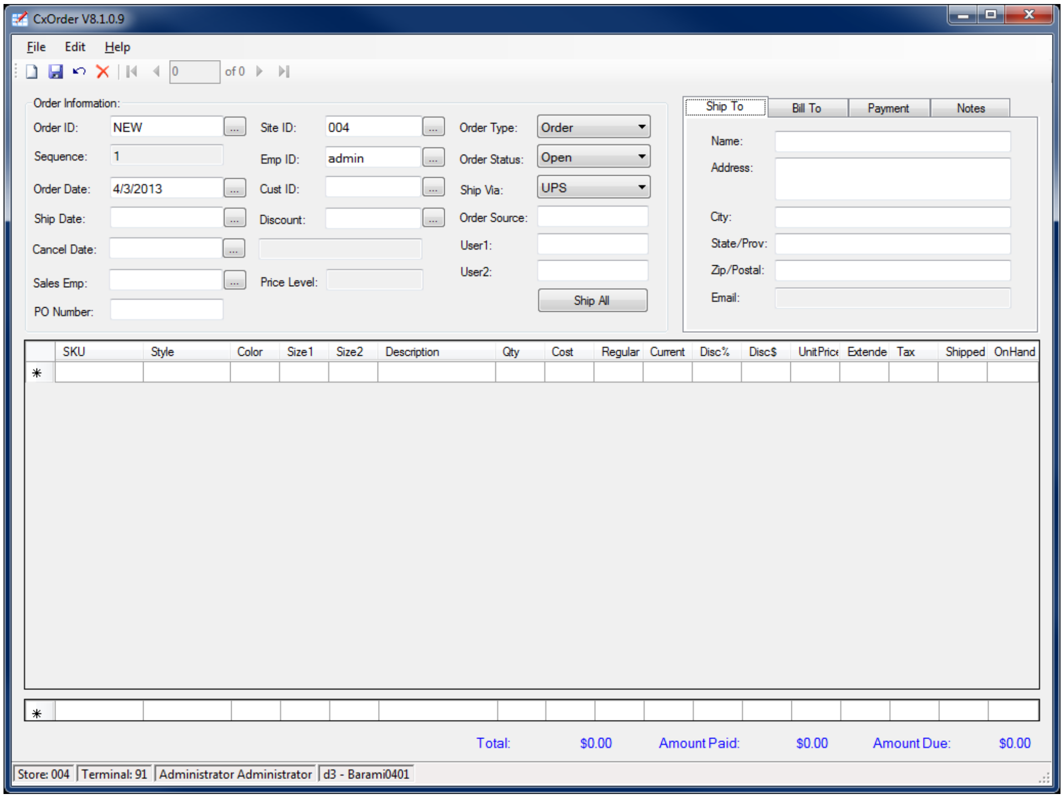
Discount The *Discount* available to customer on all orders. This is an optional field.

Price Level The price level for this Customer. This is maintained in the customer management utility.

Order Type	Specifies the type of work order. There are three different types of work orders to choose from: *Quote*, *Order* and *Invoice*.
Order Status	Specifies the transaction status of the work order. A work order can be one of seven different statuses: *Open*, *Hold*, *Shipped*, Released, *Cancelled* and.
Ship Via	Select the company being used to deliver the shipment via the drop down list. This list is maintained in the shipping methods under the edit menu.
Order Source	Indicates where the order originated from, i.e.- *Mail*, *Catalog*, *Email*, *Phone*, etc.
User1	This is a customizable field for additional features.
User2	This is a customizable field for additional features.
Ship All Button	When the order is ready to be shipped, rather than entering each quantity shipped manually, pressing this button will assume that all quantities ordered are being shipped. Do not use this if a partial shipment is being done.

Shipping Information

This area contains information for *Shipping*.



Name The name of the individual or company that the order is to be shipped to.

Address Contains the street address of the individual or company that the order is being shipped to.

City The city where the order is to be shipped.

State/Prov The *Province or State* where order is to be shipped.

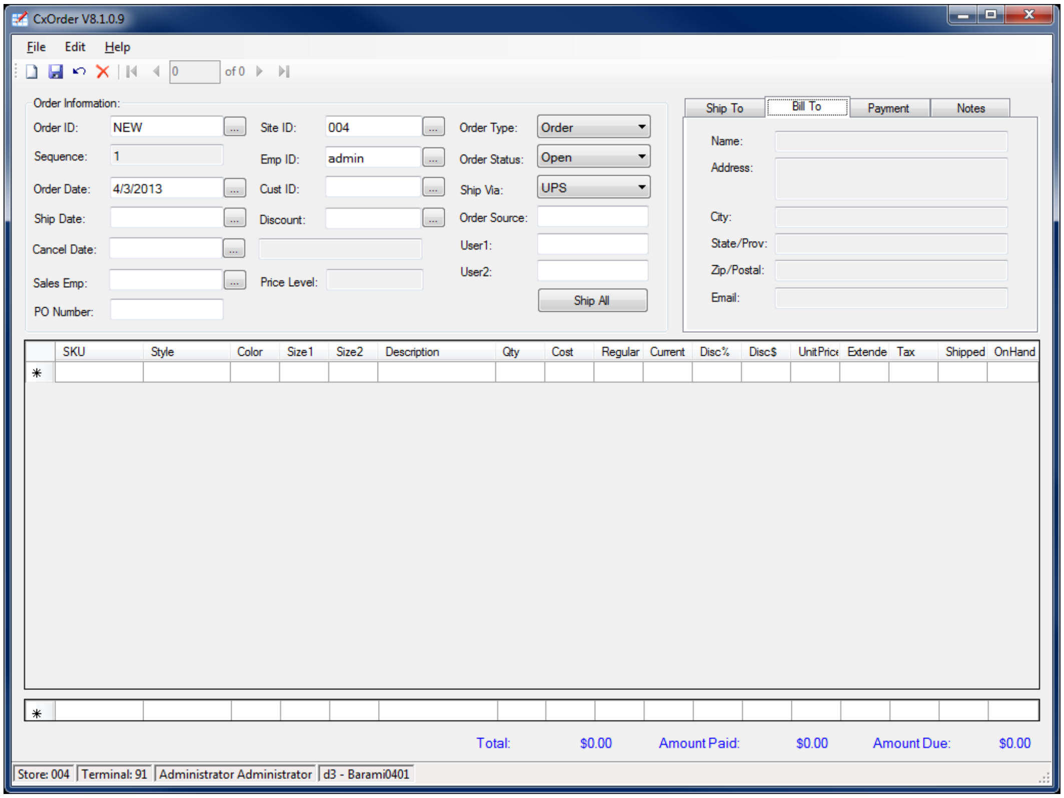
Zip /Postal The *Postal or Zip Code* where order is to be shipped.

Ship Country The *Country* where order is to be shipped.

Email The *Email* Address information for the ship to.

Billing Information

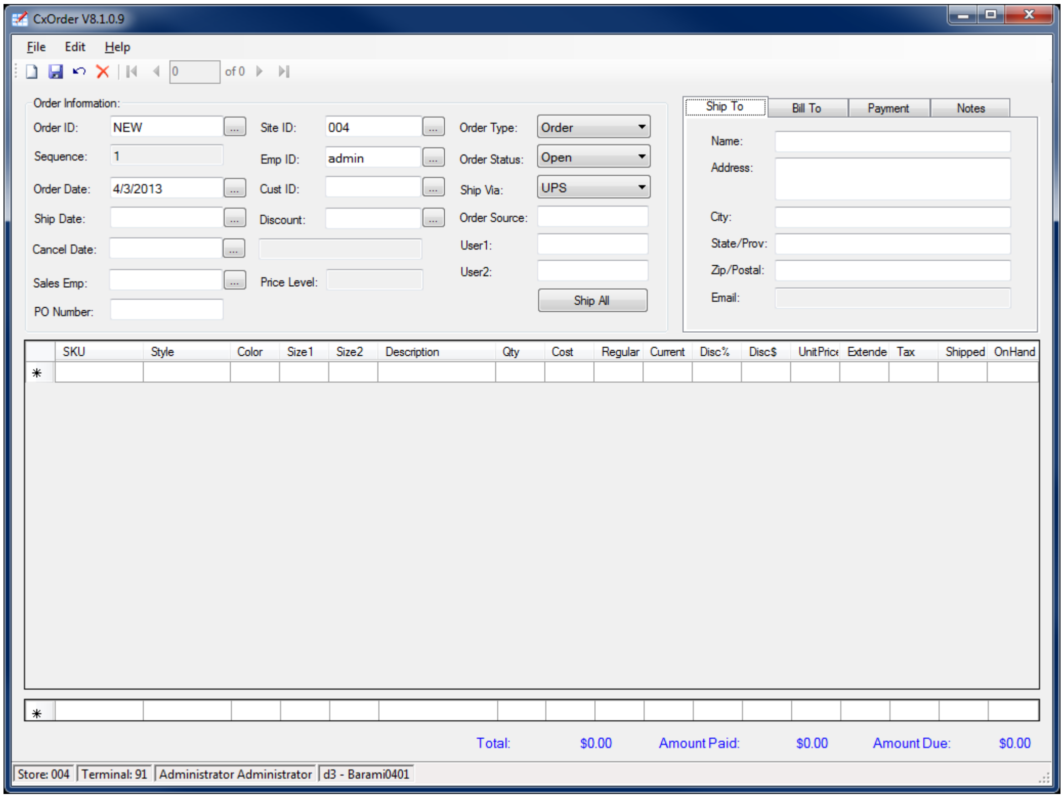
This area contains information for *Billing*.



Name	The *Name* of the individual or company that the order is to be billed to.
Address	Contains the street *Address* of the individual or company that the order is being billed to.
City	The *City* where the order is to be billed.
State/Prov	The *Province* or *State* where order is to be billed.
Zip/Postal	The *Postal* or *Zip Code* where order is to be billed.
Email	The *Email* Address information for the bill to.

Items

The *Items* section contains all of the items that are being ordered. Items are entered by using their style number. Each detail line contains all of the information for each item of the shipment.



SKU The *SKU* field is where the *SKU* number is automatically populated for the detail line. The desired *SKU* number can be input here if known.

Style The *Style* field is where the *Style*name is entered for the detail line. The desired *Style*name can be input manually or selected from the search inventory screen, which is initiated by the F3 key.

Color The *Color* field contains the *Color* of the item selected. This field is filled in based on the item selected for the particular style.

Size1 The *Size* field contains the *Size* for the particular item selected. This field is filled in based on the *Size* of the item selected in the size matrix when the quantity is entered.

Size2 If the item has a second *Size*, it would be represented by this field.

Description When the style is chosen, the *Description* field is automatically filled in with the *Description* of the item on record. The *Description* used is the item's *Description* from its inventory master record.

Qty The *Quantity* of each style for this transaction. For items that have different sizes, colors, or leg lengths, upon entering the *Quantity* field the quick quantity dialog box will appear.

Cost The *Cost* for a selected style per unit.

Disc% The total percentage that is being discounted for the item. This is where the discount is entered.

Disc$ The total amount that is being discounted for the item. This is where the discount is entered.

UnitPrice The per unit selling price for the selected style. The *Unit Price* does not need to be entered as the field is automatically filled by the system.

Extended The total amount, including all taxes for each style ordered. The *Extended* field is calculated by multiplying the quantity by the *Unit Price* field and adding all applicable taxes. The *Extended* field is filled in by the system. There is no need to enter an amount manually.

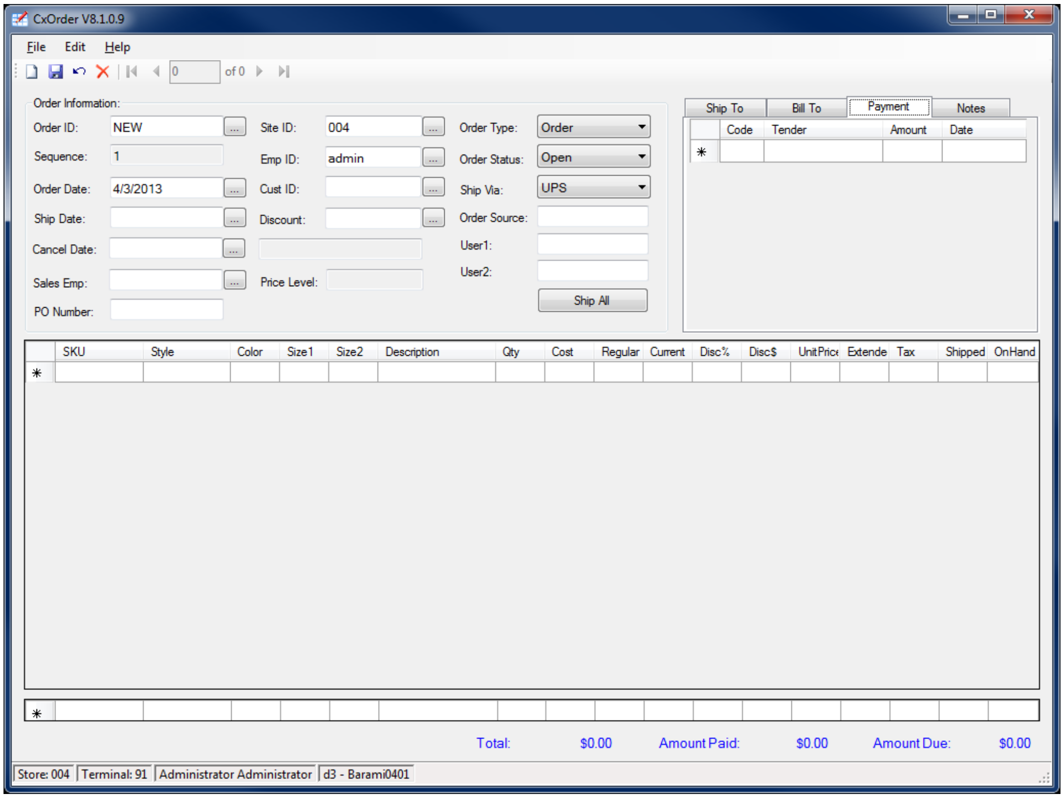
Tax The total *Tax* applied to this item.

Shipped The quantity that was actually *Shipped* for each style. The quantity *Shipped* field is used for keeping track of the status of each style in the order. If the quantity ordered was 20 and the quantity *Shipped* was 15, then five more units of that style would need to be sent to the customer to close the order for that style.

OnHand The total number of items for that SKU that are currently*onhand*.

Payments

The *Payments* received from the customer, for each order, are entered using the *Payment* screen. If the customer makes a deposit, the amount is entered through the *Payment* screen. The *Payment* screen keeps track of the each order's *Payments* in chronological order.



Code The *Code* field specifies the numeric tender code that is being used for the payment. The *Code* can be entered manually, or it can be selected from the list of available tender types by pressing the F3 key.

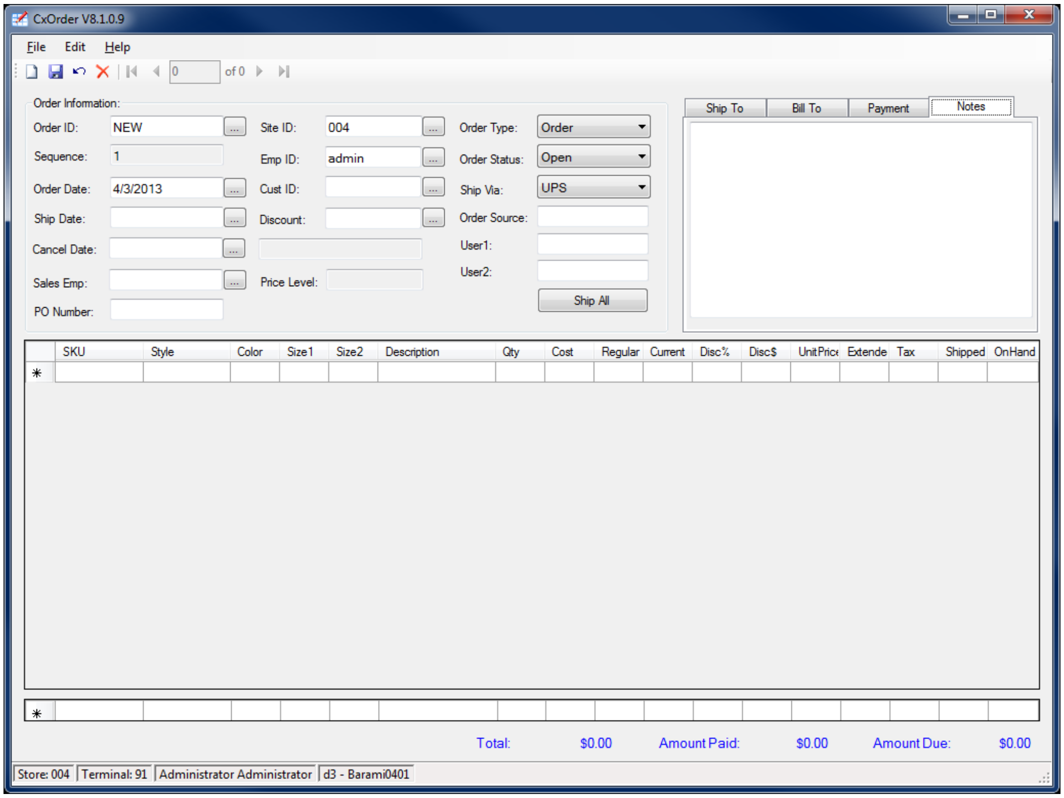
Tender The *Tender* name that is being used for the payment. This will automatically populate with the correct values when a valid code is chosen.

Amount The *Amount* field is where the *Amount* to be applied to the tender code is entered. The value entered is interpreted in units of dollars.

Date Automatically populates the current system*Date*as the payment *Date*. If needed the payment *Date* can be modified to any other valid *Date*.

Notes

The *Notes* tab allows notes on the order. There is no limitation on how much text is stored in the *Notes* field.



Completion of orders

When a request comes in all the details are entered into the screens as they are required. After all the order information, shipping, billing, etc, has been entered into the system and the order has been saved, it is time to prepare the order for processing. Changes to the Order Type, Order Status, Back Order and Inventory Movements all happen at this stage of the order depending how the order is to be processed.

Data Entry

When an order or quote request is received the information is entered into the main screen. After entry the information must be saved. Once it is saved an Order ID is assigned to this request.

Order Types

Orders have two user selectable options, Order and Quote, in addition to the automatically populated Invoice type.

Quote	Used to quote a price to a customer prior to approval.
Order	An order request on behalf of the customer.
Invoice	Indicates that the items on this order or sequence have been shipped and billed. This option is automatically chosen.

Order Status

In Order Entry there are several available status options. Below each one is explained.

Open	This is the default status of a new order. It will remain in open until changed manually and must be changed prior to invoicing.
Hold	Use this status if the order is on hold.
Released	Use this status if the order is ready for fulfillment and approval.
Shipped	This status is used when items have been shipped to the customer. This status will create movements the next nightly maintenance cycle.
Cancelled	Use this status if the order has been cancelled.
POSTED	This status indicates that it has been completed and inventory has already moved at this point. This status is automatically selected indicating that this Order or Sequence is complete.

Back Orders

There are times when only a part of the order can be sent and the remaining order may be shipped at a later time. In this case a back order can be created. This allows multiple partial shipments without having to create several smaller ordersto replace the original larger incomplete order. This process also allows the customer to receive all available products in a timely fashion while keeping the original order intact. Choosing to ship a partial shipment and pressing save will prompt if in fact a back order should be created for the remaining unshipped items.

Create Invoice

This is the final stage for an order or sequence. Choosing this option from the file menu will display a new screen. If the correct order and sequence have been populated choose Export. Record the exported batch number if required. Click on OK and close this window when done. At this stage the Order Type changes to Invoice indicating that nothing further can be done to this sequence. The Order Status may continue to say shipped until the nightly maintenance has concluded, at which point it will say POSTED.