

AGILIA

User Manual



CONTACT Order Taking

Welcome

Thank you for purchasing AGILIA software. This user manual will introduce you to the most important functions of AGILIA in a quick and efficient way.

This part of the manual describes the handling of the module: **Contact – Order Taking**

Please read the following manual thoroughly. Should you have questions nevertheless, please do not hesitate and contact our support: support@ebit.at, +43 732 602232-50.

In reference to our products we provide trainings. In case of interest we willingly send you a detailed description of our trainings. Do you have any questions? Send us an e-mail at: office@ebitonline.com or call us at: +43 732 602232.

Note: The views of the displayed menus, menu items and screenshots may possibly differ from your actual screen view – depending on your individual settings, your rights in AGILIA and on the modules you have purchased.

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1 General Information

Order taking is part of the module Contact of AGILIA. You can create new articles and article groups with it, take someone's orders and conduct reports concerning the sales success.

In this part of the user manual you will find the description of the parts that deal with order taking, article administration and the corresponding reports in AGILIA.

Where Do I Find the Menu Item Order Taking?

In AGILIA you find the menu ORDER TAKING. Here you have the choice between following menu items:

ARTICLE, ARTICLE GROUP, REPORTS and ORDER TAKING.

MENU	Dynabase	Campaign	Order taking	Contact	Time tracking	System
ORDER TAKING	Article	Article group	Reports	Order taking		
ARTICLE	<< < 1-1/1 > >>	New article				

Figure 1: Menu order taking

2 Create and Administer Articles

Here you learn how to create a new article and how to administer or edit the articles later on.

2.1 Create New Article

In the menu ORDER TAKING click on the menu item ARTICLE, NEW ARTICLE.

Figure 2: Create new article

- 1** The internal number for the article is automatically generated by the system.
- 2** Enter an article number. This is a required field.
- 3** In case you create a version of this article the number will be automatically created.
- 4** Enter a name for the article. This is a required field.
- 5** You can add details (comment) for the new article.
- 6** Define in which unit (kg, m ...) the article is sold.
- 7** If necessary you can assign the article to one or more article groups. Click on the dot button  of the field "Article groups" and select the desired article group in the new window.

Note: Before you are able to assign articles to article groups you have to create article groups in the menu ORDER TAKING, menu item ARTICLE GROUP, NEW ARTICLE GROUP.

- 8** Enter a net and gross sales price for the article. The field "gross sales price" is a required field.
- 9** Select the tax class.

Note: You can define the settings of the tax classes in the menu SYSTEM, in MASTER DATA, "Tax rates".

- 10** Enter a value for the mailing expenses. This is a required field.

- 11** The field "Base price" is describing the base price of the article per quantity (e.g. \$ 1 per 1 kg).
- 12** The field "Quantity" is describing the quantity for which the base price is applying (e.g. \$ 1 per 1 kg).
- 13** When you activate the checkbox "Exclude from reports" you define that this article is not considered in the sales statistic.
- 14** When you activate the checkbox "Only in upselling list" you define that this article is only appearing as upselling article in the order taking dialog.

Note: In order to define an article as upselling- or main-article you have to save the article and then the relevant fields are available.

- 15** With the checkbox "active" you define whether this article is active or inactive.

Click on to activate the settings.

You have successfully created a new article.

2.2 Create Versions

In the menu ORDER TAKING click on the menu item ARTICLE and you receive the list of available articles.

%	a...Article no	Go		a...Article no	Go		a...Article no	Go	Res
☐	ARTICLE	000001a	T-Shirt	6					
☐	VERSION	000001c	T-Shirt Red	8					
☐	VERSION	000001d	T-Shirt Black	9					
☐	VERSION	000001e	T-Shirt Green	13					
☐	VERSION	new							
☐	ARTICLE	000001b	T-Shirt White	7					
☐	VERSION	new							
☐	ARTICLE	0000002	Trousers long	10					
☐	VERSION	new							

Figure 3: Create new version

Search the relevant article, click on the button and a new version of this article will be automatically created.

To change the settings of the new version open the version by clicking on . The same dialog as when creating a new article is opened, however, it is already filled out. Here you can make the required changes and define the final settings.

With the button "Version assignment" you can assign this version to another article if necessary.

Save the version and all changes are confirmed.

2.3 Edit and Administer Articles and Versions

In the menu ORDER TAKING, menu item ARTICLE and you can search articles and edit them.

Click on  to see the details of the relevant article or version and to edit them.

Now you can set in the field "Main article" and in the field "Upselling articles" which articles or versions should be defined as main or upselling article.

In case you want to delete an article or version from your product line click on

Delete

3 Article Group

Here you learn how to create new article groups and how to administer and edit them later.

3.1 Create New Article Group

In the menu ORDER TAKING click on the menu item ARTICLE GROUP, NEW ARTICLE GROUP.

Figure 4: Create new article group

- 1** Enter a name for the new article group. This is a required field.
 - 2** You can add details (comment) for the article group.
 - 3** The field "Show priority" is describing the sequence of display of the different article groups.
-
- Note:** In the current version of AGILIA is this field without any function.
-
- 4** You can create a hierarchy in the field "Superior article groups". Click on the dot button to get to the selection of article groups.
 - 5** With the checkbox "active" you define the status (active, inactive) of the article group.

Click on to activate the settings.

You have successfully created a new article group.

3.2 Edit and Administer Article Group

In the menu ORDER TAKING, menu item ARTICLE GROUP and you can search article groups and edit them.

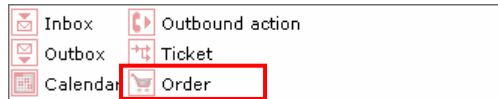
Click on to see the details of the relevant article groups and to edit them.

In case you want to delete an article group from your product line click on .

4 Order Taking

There are several ways to take up an order in AGILIA:

- 1 In the icon box in the upper left part of the screen - Order 



- 2 In Dynabase directly in the profile – the symbol 

COMPANY	EBIT GmbH	18018	HISTORY					
CONTACT PERSON [1/2]	Schwendtner -50							
CONTACT PERSON [2/2]	Harald Kiss -50							
PHONE [1/1]	43 732 602232 50							

Note: The relevant data of the profile are transferred to the ticket automatically. If necessary they can be over written.

- 3 In the menu ORDER TAKING, menu item ORDER TAKING:

MENU	Dynabase	Campaign	Order taking	Contact	Time tracking	White pages
ORDER TAKING	Article	Article group	Reports	Order taking		

- 4 In the menu CONTACT, menu item CONTACT DESK in the questionnaire of the project – the symbol 

Project: outbound3	
Follow-up calls	handled by / at
[Edit profile in Dynabase] - [History]	Comment

Note: The administration of the rights (to see certain icons) can be changed in the menu SYSTEM menu item GROUP – EDIT MENU RIGHTS.

Independent of how you access the order taking dialog always the same dialog will be opened in a new window. The parts of this order taking dialog are described in the following chapters.

How to finish and save the order taking read in chapter 5 Save Order.

4.1 Profile Data

Figure 5: Order taking – Profile data

- 1** Enter a customer number if necessary.
- 2** Enter the relevant data of the profile. The fields "Title" and "Last name" are required fields.

Note: It may be the case that some profile data has already been filled out if you access the order taking dialog directly from the profile.

- 3** Enter company details if necessary.

Note: It may be the case that some company data has already been filled out if you access the order taking dialog directly from the profile.

- 4** You have the possibility to enter a new phone-, cell phone- and fax number as well as a new e-mail address or you can change existing data when accessing the order taking dialog directly from a profile.

Note: It may be the case that (cell) phone- and fax number already appear if you access the order taking dialog directly from the profile.

4.2 Address Data

Figure 6: Order taking – Address data

- 1 Select – in case it already exists – a delivery address from the list.

Note: A delivery address will be available if you select and access the order taking process directly from a profile or if you have search this profile before in the dialog PROFILE SEARCH.

- 2 Enter the address details – the fields "Street", "Zip code" and "City" are required fields.
 - 3 If necessary you can select a different billing address which is not the same as the delivery address. If you click the button you will receive new address fields below.
-

4.3 Payment

Figure 7: Order taking – Payment

Select the appropriate form of payment and enter credit card or bank account details in the corresponding mask if required (see 5.1 Possible Ticket Types and Forms of Payment).

Note: You can define the settings of the payment in the menu SYSTEM, in MASTER DATA, "Order taking".

4.4 Products

ORDER Close

Type: Order Save

Profile data Address data Payment **Products** Miscellaneous Profile search

All **1** A-C D-F G-I J-L M-O P-R S-U V-Z

Article No	Article name	Price	Buy
000003	Belt	12.00	
3 + 000001a	T-Shirt	12.00	
000001b	T-Shirt White	12.00	2
0000002	Trousers long	24.00	

Shopping cart items

Sum of article prices	60,00
Mailing expenses	12,00
Total	72,00

Qty	Art. No	Product	Price
2	000001a	T-Shirt	24,00
1	000001b	T-Shirt White	12,00
1	0000002	Trousers long	24,00

5 **Upselling articles**

000003	Belt	12.00	
+ 000001a	T-Shirt	12.00	

Type: Order Save

Figure 8: Order taking – Products

- 1 You can display the products in alphabetical segments or all at once.
- 2 Click on the order taking icon to add a product to the shopping cart.
- 3 You can see all versions of a product with a click on .
- 4 You see the added articles (with article and total price, including mailing expenses) in the shopping cart. You can rise or reduce the number of precuts with the buttons .
- 5 If upselling products are defined for a certain product they will appear automatically when adding this product to the shopping cart.

Note: You can define the settings for upselling articles in the menu ORDER TAKING, menu item ARTICLE.

4.5 Miscellaneous

The screenshot shows the 'ORDER' form with the 'Miscellaneous' tab selected. The form has a yellow header bar with the title 'ORDER' and a 'Close' button. Below the header is a navigation bar with icons and labels for 'Profile data', 'Address data', 'Payment', 'Products', 'Miscellaneous' (active), and 'Profile search'. To the right of the navigation bar is a 'Type:' dropdown menu set to 'Order' and a 'Save' button. The main content area is divided into two sections. The first section, labeled with a red '1', contains fields for 'Order date:' (10/28/2005), 'Delivery date:' (10/29/2005), and a 'Comment:' text area. The second section, labeled with a red '2', is titled 'HELPDESK TICKET' and shows 'Processing time: 00:14:25'. It contains fields for 'Ticket ID: 155', 'Subject:', and 'Details:', along with an 'Attachment:' section with a 'File upload' button. At the bottom right of the form, there is another 'Type:' dropdown menu set to 'Order' and a 'Save' button.

Figure 9: Order taking – Miscellaneous

- 1** You can change the order or delivery date if necessary and add comments to the order.
- 2** You can create a helpdesk ticket.

Note: If necessary you can also create other tickets/ticket flows for the order taking process.

4.6 Profile Search

The screenshot shows the 'ORDER' dialog box with the 'Profile search' tab selected. The search input field contains 'ebit%' with a red '1' next to it. A table of search criteria is visible, including Last name, First name, Internal number, Customer number, Zip code, City, Street, Number, Country code, Area code, Phone number, and Extension. A red '2' points to the 'Search' button. A red '3' points to a search result for 'EBIT GmbH (18018), -- -- , -- Harald Kiss Gernot Schwendtnr'.

Figure 10: Order taking – Profile search

- 1 You can search for profiles by means of wildcards (l, f ...).

Note: Please note the pure search with the wildcard % is not allowed in this dialog. Enter an exact keyword/search term or a keyword in combination with a wildcard %.

- 2 Click on to search profiles.

Note: If you want to confirm the search with "Enter" no search is performed, instead the order is saved!

- 3 Click on the desired profile and the data of this profile will automatically be transferred to the order taking process.

5 Save Order

When you are saving the order you can select which ticket type you want to use for the order taking process. Therefore choose the desired ticket type from the list.

Note: You can define the settings of the ticket types in the menu SYSTEM, in MASTER DATA, "Order taking".

Note: You can create and edit ticket flows in the menu CONTACT – PROJECT ADMINISTRATION, menu item TICKET FLOW.

The screenshot shows the 'ORDER' dialog window with the 'Miscellaneous' tab selected. The 'Type' dropdown menu is open, displaying three options: 'Order', 'Callback urgent', and 'Complaint'. The 'Order' option is currently selected. The 'Save' button is located to the right of the dropdown menu. The dialog also contains fields for 'Order date', 'Delivery date', 'Comment', 'Ticket ID', 'Subject', 'Details', and an 'Attachment' section with a 'File upload' button.

Figure 11: Select ticket type

Enter subject and details of the helpdesk ticket in the dialog window "Miscellaneous" – unless it is already preset (see 5.1 Possible Ticket Types and Forms of Payment).

Save the order with clicking on **Save**. Depending on the settings of the ticket type a helpdesk and/or an order ticket is created and the relevant ticket flow is being processed according to the predefined setting.

Note: Such a process could make sense for example when the order cannot be processed or taken up at the moment and would have to be completed with a callback.

5.1 Possible Ticket Types and Forms of Payment

You can activate possible ticket types and make the necessary settings in the menu SYSTEM, menu item MASTER DATA – ORDER TAKING. Here you define which ticket flows should be displayed in the order taking process.

Possible ticket types:

☐	Ticket type: Callback	Default ticket-subject:	Ticket status: Temporarily open
	Complete ticket: ☐	Default ticket-text:	
	Create order ticket: ☐		
☒	Ticket type: Callback urgent	Default ticket-subject:	Ticket status: Temporarily open
	Complete ticket: ☒	Default ticket-text:	
	Create order ticket: ☐		
☒	Ticket type: Complaint	Default ticket-subject:	Ticket status: Temporarily open
	Complete ticket: ☐	Default ticket-text:	
	Create order ticket: ☐		

Possible payment types:

- ☒ Cash on delivery (COD)
- ☒ Direct debit

Possible credit cards:

- ☒ American Express
- ☐ Carte Blanche
- ☒ Diner's Club
- ☐ Discover
- ☐ enRoute
- ☐ JCB
- ☒ Master Card
- ☒ VISA

Figure 12: Possible ticket types and forms of payment

- 4** Activate the ticket type to be able to select it later in the order taking process.
- 5** With the option "Complete ticket" you define that the created helpdesk ticket is completed in your message inbox as soon the ticket status is changed from "Temporarily open" to "Open".
- 6** You can enter a default ticket subject and a default ticket text if necessary. Those default values can be overwritten in the actual ticket.
- 7** Select the ticket status (open, temporarily open).
- 8** You can choose the credit cards and possible payment types which should be available in the order taking process.

6 Edit Order

For every created order there is automatically created an order ticket in the history of the profile [HISTORY](#).

Search the relevant profile and click on [HISTORY](#). Now you see the summary of all tickets for this profile.

Open the relevant order ticket.

The screenshot shows a software interface titled 'HISTORY' for 'EBIT GmbH'. It features a grid of 16 ticket types, each with a checkbox and an icon. Below this grid are navigation buttons (back, forward, etc.) and radio buttons for sorting by date or ticket type. A table lists the ticket types, with 'ORDER TICKET' highlighted. To the right of the table are 'Close' and 'Reload' buttons. Below the table, the details for the selected 'ORDER TICKET' are shown, including its date, status, creation/modification history, customer information, and a list of ordered articles with their prices and quantities.

Art-Nr.	Name	Preis	Menge	Summe
000001a.0	T-Shirt	12.00	3.00	36.00
000001b.0	T-Shirt White	12.00	1.00	12.00
0000002.0	Trousers long	24.00	1.00	24.00
000003.0	Belt	12.00	1.00	12.00

Figure 13: Order ticket

Now you see the details (created by, status, customer ...) and the ordered articles. Click on [Edit](#) to open the order taking process once again (see 4 Order Taking).

You have the possibility to make changes (e.g. reduce or add articles, change address ...) and save them. You can even cancel the whole order by clicking on [Cancel](#).

7 Reports

7.1 Order Statistic

REPORT ORDER STATISTIC

Date from 10/30/2005 12:00 to 10/30/2005 5:18 P

Created by

Close Start report

Figure 14: Order statistic – Start report

Enter the relevant dates and select the user(s) who have created/taken up the order.

With you start the report.

Order statistic

Report status: **Completed**

1 **4**

Report for client: **AGILIA**
 Created by: **Schwendtner Gerry** **2**
 Date: **10/30/2005 12:00 AM - 10/30/2005 5:21 PM**
 Created by: **Schwendtner Gerry**
 Created on: **10/30/2005 5:21 PM**

User	Article name	Price	Qty	Sum
		Sum	0	0.00
Schwendtner Gerry	Belt	12.00	1	12.00
	T-Shirt	12.00	3	36.00
	T-Shirt White	12.00	1	12.00
	Trousers long	24.00	1	24.00
		Sum	6	84.00
		Sum	6	84.00

3

Figure 15: Order statistic – Report

- 1** You can make a new report or repeat this report.
- 2** You see the report details.
- 3** In the order statistic you see the sales per user (seller) and the corresponding details and sums.
- 4** You can copy the report to the clipboard, print the report or close the window.

8 Master Data

8.1 Order Taking

See 5.1 Possible Ticket Types and Forms of Payment.

8.2 Tax Rate

You can create and define tax rates in AGILIA for the order taking process. In the overview you see which tax rates might already exist in AGILIA.

Note: For searching use the wildcards which are commonly used in AGILA (mainly %).

To see further details of the tax rates click on  – here you can change the settings if necessary.

To enter a new tax rate into the system select the command TAX RATE – NEW TAX RATE in the menu SYSTEM, menu item MASTER DATA.

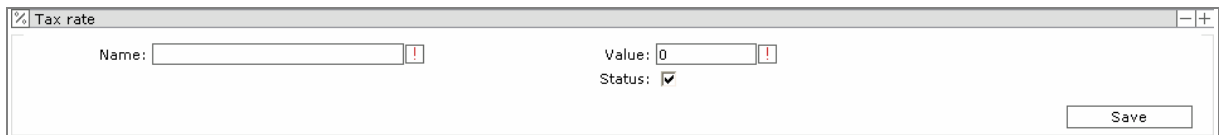


Figure 16: New tax rate

You have to enter a name for the new tax rate. This is a required field.

You have to enter a percentage value – in the form "0,xx", e.g. 0,20 for 20%. This is a required field.