



p o s e i d o n
e B u s i n e s s S u i t e

User Manual
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Welcome

Welcome to Poseidon... a product of over four years of development and seven years of research. Poseidon has been created from what has been learned from hands-on experience with running, managing, and maintaining e-commerce businesses dealing with hundreds to thousands of transactions per day. Poseidon gives you the tools to run your business efficiently and successfully.

At Sonicode, we believe our success is entirely invested in yours. Implementation of our market leading e-commerce solution does not require the costly purchase, installation, or hosting of any additional hardware or software. Only a web browser is required. Sonicode maintains all of the necessary technology for you, saving your business tens of thousands in IT expenses.

Features

Web Storefront

- Unlimited product categories
- Unlimited products
- Products search
- Manufacturer information
- Sort by product name or popularity
- Actual real-time product stock status
- Unlimited related products (up-sell items)
- Product images are automatically resized
- Products can be automatically removed from the storefront when they are sold out
- Accurate Fedex, UPS, and USPS shipping rates
- Free shipping for selected individual products
- Cost based price calculation for each product
- Customer can view total order price before signing up for an account
- Products can be set to "on special" and displayed on front page
- Secure SSL encryption
- Easy password recovery
- Customers can check order status
- Customer can login to view their tracking number
- PayPal support
- Authorize.net, Payflow Pro, USA ePay, and Linkpoint payment gateway support
- COD payment support for Fedex and UPS shipments
- Froogle, Bizrate, Shopzilla, Nextag, Pricegrabber, Shopping.com, and Yahoo Shopping engine support

Inventory

- Serial number tracking
- Barcode generation and printing
- Barcode scanner support
- Non-inventory item support
- Full manufacturer information for each product
- Supports different product packaging types
- Warranty information for RMA procedure
- Unlimited stock areas

Sales

- Unlimited customers
- Quotations
- Completely integrated order management solution
- Store/validate credit card information
- Multiple shipping addresses for each customer
- Professional Sales Order and Invoice document printing
- Customer order history
- Customer payment history
- Customer shipment history
- Customer returns (RMA) support
- Customer return history
- Real time stock status and inbound purchase order status

Purchasing

- Unlimited vendors
- Completely integrated purchase order management
- Automatically generate purchase orders based on minimum stock levels
- Vendor purchase order history
- Vendor payment history
- Vendor returns (RMA) support
- Vendor return history
- Generate/assign serial numbers on purchase orders

Warehouse

- Automatic pick list generation
- FedEx, UPS, USPS shipping label generation
- One-click shipping
- Barcoded inventory ensures accuracy
- Shipment notifications are automatically sent to customers upon shipment creation

Reports

- Gross profit
- Payment history
- Order referrers
- Shipment summary

Management

- Web based store configuration
- Unlimited merchant accounts
- Evenly distribute sales volume across multiple merchant accounts
- Multiple level permissions system
- Add handling charges on top of calculated shipping charges

Getting Started

Before you are ready to start accepting online sales, there are a few steps you must first complete. The following section is a quick-start guide to get you on your way to harnessing Poseidon's powerful business automation features.

Configuration

The first few steps to getting started with Poseidon involve setting up shipping services, payment methods, merchant accounts, and other aspects of sales transactions will be handled.

General Settings

Open the Poseidon Administration Window and mouse-over the Management icon. Choose the General Settings option.

Fill out the fields displayed in the Company Info tab of the General Setup window. This company information will be displayed on your web storefront, invoices, and automated e-mail correspondence.

Click on the Sales tab to open the sales specific general settings. The Sales Inventory Area field specifies what stock area serial numbers are transferred to after being sold to customers. The default setting for the Sales Inventory Area field is "CUSTOMER OUT". The Returns Inventory Area specifies what stock area serial numbers are transferred to after being returned from a customer. The default setting for the Returns Inventory Area field is "CUSTOMER RMA". The default settings for these two fields should be adequate for most applications, but can be customized at any time.

The Sales Order Message field is where you can define a custom message that will appear at the bottom of every Sales Order, Sales Invoice, Customer Return, and Customer Credit. Usually, company policies and general warranty information is stored in this field. The following is an example:

Thank you for choosing Sample Company. If any of the products you received are missing, damaged, or incorrect, please call us immediately at 1 (111) 123-4567 You must contact Sample Company within 1 business day from delivery to report any error in shipment. Any defective products with manufacturer warranty must be returned directly to the manufacturer.

The Sales Order Confirmation Email field is where you can specify an automated e-mail message that will be sent to your customers after they successfully place their order. Enter whatever message you want to be sent to all of your customers. Here is an example:

The screenshot shows a web-based configuration window with three tabs: "Company Info", "Sales", and "Purchasing". The "Company Info" tab is active. The form contains the following fields:

- Company Name: [Empty]
- Photo Zone: [Empty]
- Company Motto: Digital Cameras
- Street Address: 12345 SW 138th Ave
- City: Miami
- State: Florida (dropdown menu)
- Zipcode: 33198
- Country: United States of America (dropdown menu)
- Phone: (111) 222-3333
- Fax: (333) 222-1111
- Support Email: sales@sonicode.com
- Sales Email: sales@sonicode.com
- Info Email: sales@sonicode.com
- Purchasing Email: sales@sonicode.com
- HTTP Host: poseidon.sonicode.com
- HTTPS Host: poseidon.sonicode.com
- Force SSL: No (dropdown menu)
- Path To Imagemagick Convert: /usr/bin/

A "Save" button is located at the bottom right of the form.

Your order has been successfully placed! This email is your confirmation with details about your order. These details are listed below. If you have any questions pertaining to your order, please feel free to contact us at sales@sonicode.com.

You can return to Sonicode's web site located at <http://www.sonicode.com> 24 hours a day, 7 days a week, to check the status of your order, retrieve tracking information, or receive product support.

All of us at Sonicode would like to thank you for the opportunity to provide you with leading products and unbeatable service!

*Sincerely,
Sonicode Sales Team*

The Shipment Notification Email field is where you can specify a custom e-mail message that is sent to your customer upon shipping label creation. This message can contain custom elements such as customer name, order number, tracking number, and company name. Variables are used for each of these custom elements. Here is an example of how to use these custom elements:

*Hello %CUSTOMER_NAME%,
A shipment for your order %ORDER_NUMBER% has been created! The tracking number for your shipment is %TRACKING_NUMBER%.*

*Thank you!
Sincerely,
%COMPANY_NAME% Sales Team*

Click on the Purchasing tab to view the purchasing specific general settings. The Purchase Order Inventory Area field specifies what stock area serial numbers are transferred to after being received from vendors. The default setting for the Purchase Order Inventory Area field is "MAIN".

The Vendor Returns Inventory Area specifies what stock area serial numbers are transferred to after being returned to a vendor. The default setting for the Vendor Return Inventory Area field is "VENDOR OUT". The default settings for these two fields should be adequate for most applications, but can be customized at any time.

The screenshot shows a software interface with three tabs: 'Company Info', 'Sales', and 'Purchasing'. The 'Purchasing' tab is selected. Below the tabs, there are three main sections. The first is 'Purchase Order Inventory Area:' with a dropdown menu currently set to 'MAIN'. The second is 'Vendor Return Inventory Area:' with a dropdown menu currently set to 'VENDOR OUT'. The third is 'Purchase Order Message:' with a text area containing the text 'This is the purchase order message that will appear on all purchase documents.' At the bottom right of the window, there is a 'Save' button.

When you are done making changes, click on the Save button to save your changes and close the window.

Merchant Accounts

Accepting credit card payments with Poseidon is seamlessly integrated as a transparent transaction. Your customers stay at your website during the entire checkout process. If the credit card is declined, or if the address on file does not match, the customer is notified in real time and the order is not saved. You will need a merchant account and a payment gateway to accept credit card payments.

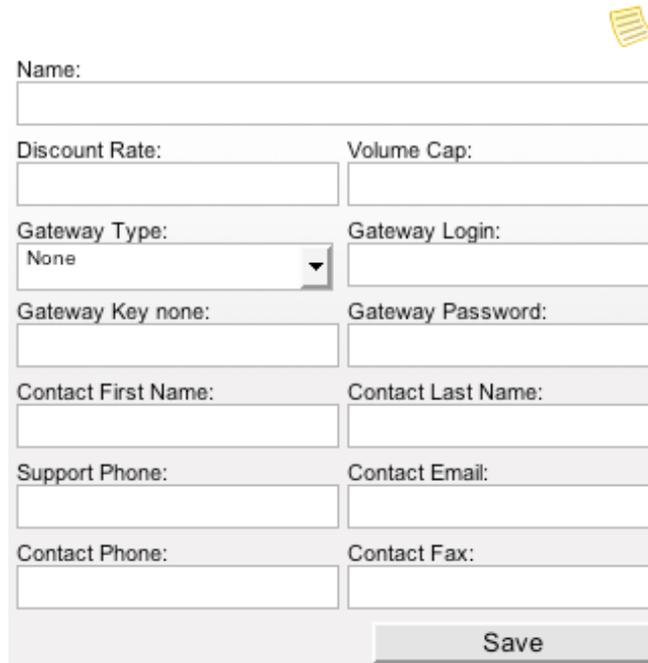
A merchant account is a service provided by a bank or a third party processor (on behalf of the bank) to the merchant. These services include authorization of credit cards, settlement of funds through the bankcard associations (MasterCard/Visa), depositing of funds to checking accounts, merchant billing, and account activity reporting. Poseidon supports an unlimited number of merchant accounts. This gives you the flexibility to shop for the best rates and easily make a transition from one merchant account to another with a better discount rate.

A payment gateway is a service that gives merchants the ability to perform real-time credit card and check authorizations from a web site over the Internet. The payment gateway connects your website directly to your merchant account. Poseidon currently supports Authorize.net, Verisign Payflow Pro, USA ePay, and Linkpoint payment gateways.

Open the Poseidon Administration Window and mouse-over the Management icon. Select the Merchant Account option to open the Merchant Account Browser.

Click on the  add new icon to add a new merchant account. The following is a reference for each of the fields in the merchant account window:

- Name: Enter the name of your merchant account provider.
- Discount Rate: Enter the percentage that your merchant account charges for each transaction. If you have multiple merchant accounts, Poseidon defaults to processing transactions using the most cost effective merchant accounts first. Poseidon moves on to the next cost effective merchant account when the volume cap of the first is exhausted.
- Volume Cap: While you may view each sale as a step toward success, merchant account providers view each and every transaction processed as a risk. When you setup a new merchant account you almost always will be approved for a pre-defined monthly volume limit.
- Gateway Type: Select your payment gateway for this merchant account.
- Gateway Login: Enter your gateway login name for this merchant account.
- Gateway Key: If you have a Verisign Payflow Pro merchant account, enter your Partner. If you have a Linkpoint payment gateway click on the "Upload Certificate" button to upload your payment gateway certificate key. Otherwise, enter your gateway key obtained from your payment gateway.
- Gateway Password: Enter your payment gateway password for this merchant account. If you have a Linkpoint payment gateway this option will not be available.
- Contact First Name: Enter the first name of your contact person with this merchant account for future reference.
- Contact Last Name: Enter the last name of your contact person with this merchant account for future reference.



The screenshot shows a form for adding a new merchant account. It includes the following fields:

- Name: [Text Input]
- Discount Rate: [Text Input]
- Volume Cap: [Text Input]
- Gateway Type: [Dropdown Menu, currently set to 'None']
- Gateway Login: [Text Input]
- Gateway Key none: [Text Input]
- Gateway Password: [Text Input]
- Contact First Name: [Text Input]
- Contact Last Name: [Text Input]
- Support Phone: [Text Input]
- Contact Email: [Text Input]
- Contact Phone: [Text Input]
- Contact Fax: [Text Input]

A "Save" button is located at the bottom right of the form.

- Support Phone: Enter your support phone number for this merchant account for future reference.
- Contact Email: Enter the email address of your contact person with this merchant account for future reference.
- Contact Phone: Enter the phone number of your contact person with this merchant account for future reference.
- Contact Fax: Enter the fax number of your contact person with this merchant account for future reference.

Click on the  notes icon save any other information within the notes window. After you have set up your merchant account, click Save to save your changes and close the Merchant Account window.

Payment Methods

Poseidon allows you to specify different payment methods and specify which are available on your online store as well as how to handle each payment. The current payment types supported by Poseidon are Credit Card, PayPal, and Other.

- Credit Card: These transactions involve a merchant account and payment gateway. Transactions are authorized in real time.
- PayPal: PayPal transactions can be web active to enable PayPal payments on your web store. A PayPal account is required.
- Other: Other transactions include any payment method that doesn't require special handling by Poseidon. Some examples of Other payment methods are Cash, Personal Checks, Money Orders, and Wire Transfers.

Open the Poseidon Administration Window and mouse-over the Management icon. Click on the "Payment Methods" option to open the Payment Method Browser.

Click on the  add new icon to add a new payment method. The following is a reference for each of the fields in the merchant account window:

- Name: Enter the name of this payment method. This value will also be used on your web store.
- Payment Type: Enter the payment type for this payment method. How should Poseidon handle this particular payment method? See above for a description of each payment type.
- Web Active: Select whether or not this payment method will be available on your web store.
- Merchant Account: Choose which merchant account to use with this payment type (only for credit card payment type).
- Cash On Delivery: Choose Yes if this is a COD payment type.

Name:		<input type="text"/>
Payment Type:	Web Active:	
<input type="text" value="Other"/>	<input type="text" value="No"/>	
Merchant Account:	Cash On Delivery:	
<input type="text" value="None"/>	<input type="text" value="No"/>	
Description:		<input type="text"/>
		<input type="button" value="Save"/>

- Description: Enter a short description of this payment type. This description will be used on your web store.

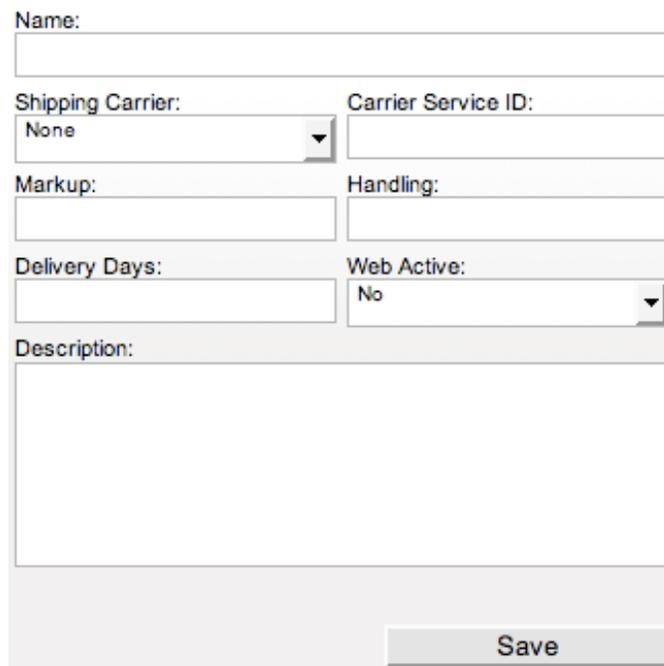
Click on Save to save your information and close the Payment Method window.

Shipping Services

Open the Poseidon Administration Window and mouse-over the Management icon. Click on the “Shipping Services” option to open the Shipping Services Browser.

Click on the  add new icon to add a new shipping service. The following is a reference for each of the fields in the shipping service window:

- Name: Enter the name of this shipping service. This value will be used on your web store.
- Shipping Carrier: Select the shipping carrier type (if the rates are to be automatically calculated).
- Carrier Service ID: Enter the designated carrier service id for this shipping service. A list of carrier service ids and their corresponding shipping services are displayed below.
- Markup: Enter the percent markup in handling you want to be added to the base rate of this shipping service.
- Handling: Enter a flat handling rate that you want to be added to the base rate of this shipping service.
- Delivery Days: Enter how many days it usually takes from shipment to delivery for this shipping service.
- Web Active: Specify whether or not this shipping service will be available on your web store.
- Description: Enter a short description for this shipping service. This description will be displayed on your web store.



The screenshot shows a web form for adding a new shipping service. It contains the following fields and controls:

- Name:** A text input field.
- Shipping Carrier:** A dropdown menu with "None" selected.
- Carrier Service ID:** A text input field.
- Markup:** A text input field.
- Handling:** A text input field.
- Delivery Days:** A text input field.
- Web Active:** A dropdown menu with "No" selected.
- Description:** A large text area for entering a short description.
- Save:** A button at the bottom right of the form.

Shipping services and their associated Service ID

Service ID	Service	Carrier
01	FedEx Priority Overnight	FedEx Express
05	FedEx Standard Overnight	FedEx Express
03	FedEx 2-Day Air	FedEx Express
20	FedEx Express Saver	FedEx Express
92	FedEx Ground	FedEx Ground
03	UPS Ground	UPS
12	UPS 3-Day Select	UPS
02	UPS 2nd Day Air	UPS
13	UPS Next Day Air Saver	UPS
01	UPS Next Day Air	UPS
14	UPS Next Day Air Early AM	UPS
Priority	US Priority Mail	USPS
Express	US Express Mail	USPS

Click on Save to save your information and close the Shipping Service window.

Adding New Products

Before you can start selling your products online, you first must enter them into Poseidon to be listed for sale on your web store. Products are associated with various attributes, such as; manufacturer type, packaging type, and warranty type. Before entering your products you should start by entering these associated attributes to ensure your product data entry is thorough and complete.

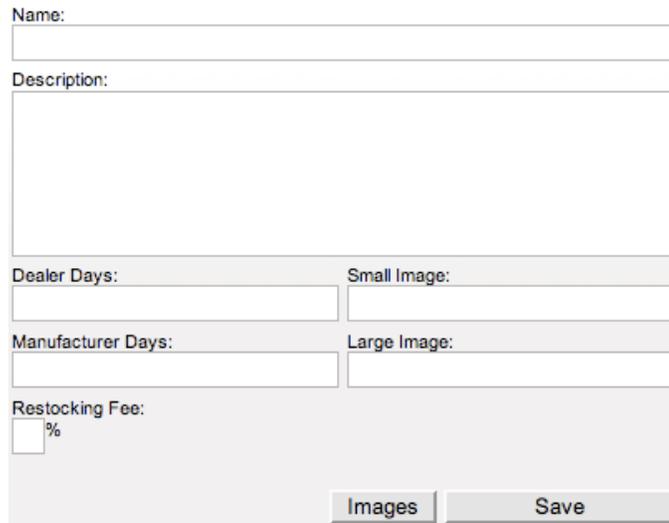
Warranties

The first step in setting up your catalog of products is to enter your different warranties for the products you sell. This information will be provided to your customers so they will know what support to expect should something go wrong.

Open the Poseidon Administration Window and mouse-over the Inventory icon. Select the “Warranty Browser” option.

Click on the  add new icon to add a new warranty. The following is a reference for each of the fields in the warranty window:

- Name: Enter the name you will use for this warranty. This field will be used on your web store.
- Description: Enter a brief description for this warranty. This field will be used on your web store.
- Dealer Days: Enter how many days the warranty is valid.
- Small image: You can upload an image that corresponds to this warranty by clicking on the Images button below.
- Manufacturer Days: Enter how many days the manufacturer supports the product.
- Large and Small Image: You can upload an image to the Image Browser that corresponds to this manufacturer by clicking the Images button.
- Restocking Fee: Enter any restocking fee percentage if it applies to this product.



The screenshot shows a web form for adding a new warranty. It includes the following fields and controls:

- Name:** A text input field.
- Description:** A large text area for a brief description.
- Dealer Days:** A text input field.
- Small Image:** A text input field.
- Manufacturer Days:** A text input field.
- Large Image:** A text input field.
- Restocking Fee:** A text input field followed by a percentage sign (%).
- Buttons:** Two buttons labeled "Images" and "Save" are located at the bottom right of the form.

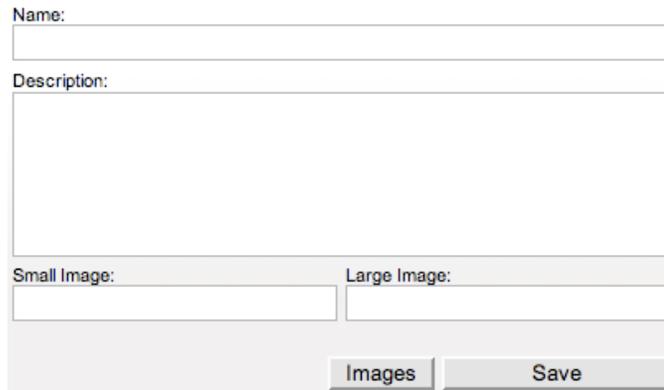
Click on Save to save your information and close the Warranty window.

Packaging

The next step in setting up your catalog of products is to enter the different packaging types for the products you sell. Some examples of packaging types include Retail Box, OEM, or Bulk. Open the Poseidon Administration Window and mouse-over the Inventory icon. Select the “Packaging Browser” option.

Click on the  add new packaging icon to add a new packaging type. The following is a reference for each of the fields in the packaging window:

- Name: Enter the name you will use for this packaging type. This field will be displayed on your web store.
- Description: Enter a brief description for this packaging type. This field will be used on your web store.
- Large and Small Image: You can upload an image to the Image Browser that corresponds to this packaging type by clicking the Images button.



The packaging window form contains the following fields and buttons:

- Name:
- Description:
- Small Image:
- Large Image:
- Buttons: Images, Save

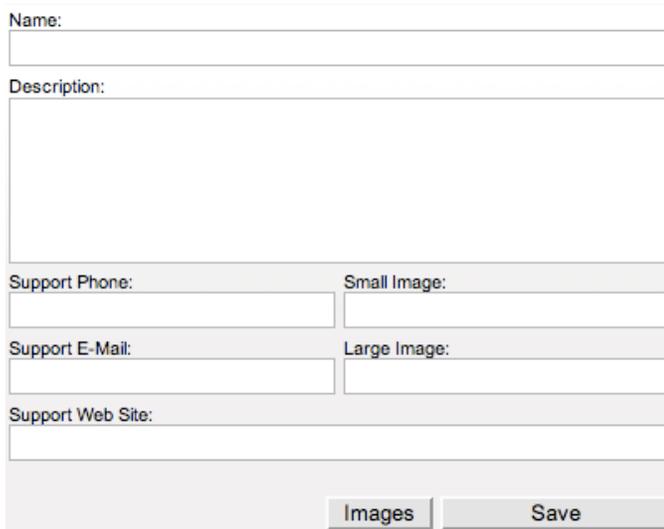
Click on Save to save your information and close the Packaging window.

Manufacturers

Next, you will need to enter the various manufacturers for the products you sell. This will allow customers to search your web store by manufacturer.

Click on the  add new manufacturer icon. The following is a reference for each of the fields in the manufacturer window:

- Name: Enter the name you will use for this manufacturer. This field will be displayed on your web store.
- Description: Enter a brief description for this manufacturer. This field will be used on your web store.
- Support Phone: Enter the support phone number for this manufacturer for post sales support.
- Support E-Mail: Enter the support e-mail address for this manufacturer for post sales support.
- Large and Small Image: You can upload an image to the Image Browser that corresponds to this manufacturer by clicking the Images button.
- Support Web Site: Enter the URL for this particular manufacturer.



The manufacturer window form contains the following fields and buttons:

- Name:
- Description:
- Support Phone:
- Support E-Mail:
- Support Web Site:
- Small Image:
- Large Image:
- Buttons: Images, Save

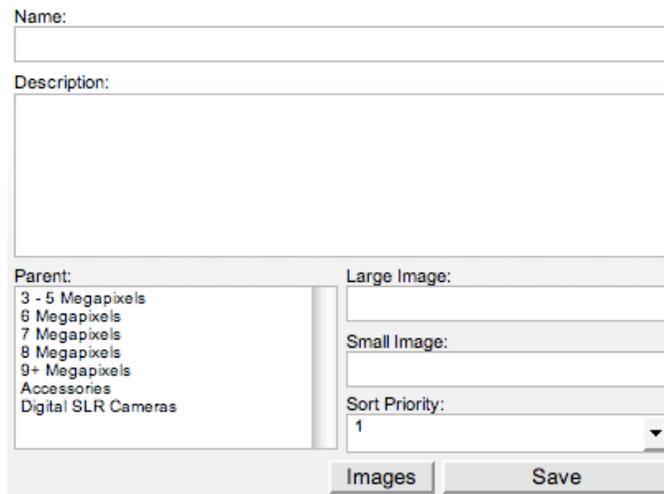
Click on Save to save your information and close the Manufacturer window.

Categories

Categories are merely a way to organize your catalog of products. Products can belong to an unlimited amount of categories. Before adding your categories, you might want to sit down and think about how you want your web store to be organized.

Click on the  add new category icon. The following is a reference for each of the fields in the category window:

- Name: Enter the name you will use for this category. This field will be displayed on your web store.
- Description: Enter a brief description for this category. This field will be displayed on your web store.
- Parent: Select a parent category that this category belongs to. If you are creating a main category you can leave this field blank.
- Large and Small Image: You can upload an image to the Image Browser that corresponds to this category by clicking the Images button.
- Sort Priority: Select a number to move this category to the top of the list on your web store. Categories with larger Sort Priority numbers will be displayed last.



The screenshot shows a web form for creating a new category. It includes the following fields and controls:

- Name:** A text input field.
- Description:** A large text area for a brief description.
- Parent:** A dropdown menu with options: "3 - 5 Megapixels", "6 Megapixels", "7 Megapixels", "8 Megapixels", "9+ Megapixels", "Accessories", and "Digital SLR Cameras".
- Large Image:** A text input field for the large image.
- Small Image:** A text input field for the small image.
- Sort Priority:** A dropdown menu with the value "1" selected.
- Buttons:** "Images" and "Save" buttons at the bottom.

Click on Save to save your information and close the Category window.

Products

Now that you have added the required related items such as categories, manufacturers, and packaging types, you can enter the products that you will offer for sale. A product is any tangible item or service that you will sell or distribute to your customers or clients.

Products can be either Inventory or Non-Inventory items. Barcoded serial numbers will be generated for each individual Inventory item when it is received on a Purchase Order from a Vendor. Non-Inventory items are usually services or items with no associated cost.

Click on the  add new product icon. The following is a reference for each of the fields in the product window:

- Name: Enter the name you will use for this product. This field will be displayed on your web store.
- Description: Enter a brief description for this category. This field will be displayed on your web store.
- Categories: Select multiple categories that this product belongs to.
- Internal Code: Enter an internal product code to help distinguish this product from other products you sell.
- Inventory Type: Specify if the product inventory will be tracked using serial numbers and barcodes.
- Large and Small Image: You can upload an image to the Image Browser that corresponds to this product by clicking the Images button.

Name:

Description:

Categories:

3 - 5 Megapixels	<input type="button" value="Merchandising"/> <input type="button" value="Extended"/>
6 Megapixels	
7 Megapixels	
8 Megapixels	
9+ Megapixels	
Accessories Digital SLR Cameras	

Internal Code: Small Image:

Inventory Type: Large Image:

Click on the Merchandising button to open the merchandising fields for this product. The following is a reference of the merchandising fields in the product window:

- Oversell: If oversell is enabled this product will be offered for sale on your web store even if there are none of those products in stock. If oversell is disabled this product will automatically be removed from your web store when you run out of stock and automatically added to your web store when you receive new inventory.
- Default Vendor: Specify the default vendor where you regularly purchase this product. This field helps you keep track of the least expensive vendors for each particular product.
- Coupon Code: Enter a unique coupon code for the customer to enter while checking out to receive the promotional coupon price.
- Coupon Price: Specify a coupon price that your customers can receive by entering the corresponding coupon code while checking out on your web store.
- Cost: Enter the usual or average cost for this product.

Oversell: Default Vendor:

Coupon Code: Coupon Price:

Cost: Markup: %

Price: Fixed Price:

Web Active: On Special:

Free Shipping:

- Markup: Enter a markup percentage to calculate the retail price of your product. If the Fixed Price field is blank your product price will be defined by cost * markup.
- Price: The calculated price of your product. This field is read-only.
- Fixed Price: If you do not want to calculate the price of your product based on cost * markup enter a price directly into the Fixed Price field.
- Web Active: If enabled, this product will be displayed on your web store.
- On Special: If enabled, this product will be displayed on your front page or on a special web store location.
- Free Shipping: Specify a free shipping service that can be promotionally associated with this product.

Click on the OK button to return to the Product window.

Click on the Extended button to open the extended fields for this product. The following is a reference of the extended fields in the product window:

- Manufacturer: Select the manufacturer that makes this product.
- Manufacturer Part #: Enter the manufacturer part number for this product.
- Warranty: Specify what warranty comes with this product.
- Packaging: Specify what packaging type this product has.
- Weight: Enter the weight of this product. Accuracy of this field is important for real-time shipping calculations.
- Volume: Enter the volume of this product in fractions of 100. Accuracy of this field is important for real-time shipping calculations.
- Minimum Stock: Enter the minimum number of products in stock before the product should be reordered. This field is used while Auto-Spawning Purchase Orders.

The screenshot shows a form with the following fields and values:

- Manufacturer: Generic (dropdown menu)
- Manufacturer Part #: (empty text input)
- Warranty: 30 Day Warranty (dropdown menu)
- Packaging: Retail Box (dropdown menu)
- Weight: (empty text input)
- Volume: (empty text input)
- Minimum Stock: (empty text input)
- OK button (bottom right)

Click on the OK button to return to the Product window.

Click on the Save button to save your information and close the Product window.

Sales

Poseidon automates almost all aspects of conducting sales and providing post sales support. Managing customers, addresses, orders, and shipments is simplified within a single web application and unified database.

A Customer is a person or business that purchases your products or services. A Sales Order is a documented request made by your Customer for products or services. Sales Orders are assigned an order status based on their stage within the order process. There are four different order status types:

1. **Canceled** - A canceled Sales Order is no longer valid. Canceled orders will no longer be processed and products attached will not be subtracted from the available inventory. After some time the canceled order number will be recycled into the system and used for a new Sales Order or Purchase Order document. Modifications can be made at any time to a Canceled order.
2. **Quote** - A Quote is a sales document which reflects an estimated cost. Products attached to a Quote will not be subtracted from the available inventory. Quotes will remain in the system indefinitely until the order status is changed either to Canceled or Pending. Modifications can be made at any time to a Quote.
3. **Pending** - A Pending Order is an order that has been requested to be fulfilled by a customer. Any products attached to a Pending Order will be reduced from the available inventory until the document order status has been changed to Quote or Complete. Modifications can be made at any time to a Pending order.
4. **Complete** - A Complete Order has been finalized and is no longer outstanding in the system. Products attached to a Complete Order will no longer reduce the amount of available inventory of that particular item. Since Complete Orders signify a final record of the transaction, no modifications can be made to a Complete Order once the order has been completed. Completed Sales Orders will have one or more associated Sales Invoice documents.

A Sales Invoice is a final record of a Sales transaction. Profit analysis and accounts receivable reporting is calculated from Sales Invoice documents. Sales Invoices are associated with their corresponding Sales Orders. Since Sales Orders can be partially fulfilled, multiple Sales Invoices can be associated with a single Sales Order. Any payment made on a Sales Order is applied to the Sales Invoice upon creation. Balance due on any Sales Invoice reflects the total balance due for that portion of the Customer's order.



Customers

To add a new customer, open the Poseidon Administration Window and mouse-over the Sales icon. Select the Customer Browser option.

Click on the  add customer icon to open the Customer window. The following is a reference for each of the fields in the customer window:

- First Name: The first name of the customer.
- Last Name: The last name of the customer.
- Company: The company name of the customer.
- Daytime Phone: The phone number where the customer can be reached during the daytime.
- Evening Phone: The phone number where the customer can be reached during the evening.
- Fax: The customer's fax number.
- E-Mail: The customers' e-mail address.
- Address 1: The customer's street address.
- Address 2: The customer's street address.
- City: The customer's address city.
- State: The customer's address state.
- Zipcode: The customer's address postal code.
- Country: The customer's address country.



The screenshot shows a form for adding a new customer. It includes fields for First Name, Last Name, Company, Daytime Phone, Evening Phone, Fax, E-Mail, Address 1, Address 2, City, State (dropdown), Zipcode, and Country (dropdown). There are also buttons for 'Set Password' and 'Save'. A notes icon is visible in the top right corner of the form area.

Click on the  Notes icon to open the notes window and enter any additional information about the customer. Click on the Set Password button to display the password field and set the password for the customer to login to your web store. Click on the Save button to save your new customer and close the Customer window.

Sales Orders

To create a new Sales Order, open the Poseidon Administration Window and mouse-over the Sales icon. Select the Customer Browser option.

Creating a New Sales Order

Click on the  new sales order icon to open the Sales Order window. All new Sales Orders are created with Quote order status. Once the new Sales Order is open, start by attaching a Customer to the new Sales Order.

Printing

To print a sales order, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for sales order printing.

Notes

To add or modify notes pertaining to this sales order, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this sales order is opened, check the Popup on document open checkbox.

Attaching a Customer

If the customer already exists in the database, click on the  Select Customer icon to open the Select Customer window. Search for the existing customer, select the appropriate customer, and click the OK button.

If the customer does not already have an account in the database, click on the  Add Customer icon to open the Customer window. Enter the customer's information and click the Save button to add the new customer to the database and attach the new customer to the Sales Order.

Serial Numbers

To view all serial numbers associated with this sales order, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.



The screenshot shows a window with two input fields: "Offset" with the value "0" and "Height Adjustment" with the value "0". Below these fields is a "Print" button. At the bottom of the window, there is a barcode with the number "7170214" above it and "P0000011" below it.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Checking Stock Status

To check the stock status of all products attached to this sales order, click on the  stock status icon to open the Stock Status window. A list of all products attached to this sales order will be shown along with their current stock status.

Specifying a Shipping Address

To change the shipping address, click on the  Select Address icon to open the Select Address window. This window will display all shipping addresses associated with your selected customer. If the shipping address is shown in the results list, select the appropriate address and click the OK button to attach this shipping address to the Sales Order.

If the desired shipping address is not shown in the results list, click on the  Add Address icon to open the Address window. Enter the customer's shipping address information and click the Save button to add the new customer shipping address to the database. The new shipping address will be displayed in the Select Address results list. Select the new address and click the OK button to attach this shipping address to the Sales Order.

Modifying the Order Date

To modify the Order Date, click on the  Order Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the order date will be updated.

Setting the Due Date

To modify the Due Date, click on the  Due Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the due date will be updated.

Changing the Order Status

If you would like to change the status of the order, simply select the desired order status from the Order Status pulldown menu.

Adding a Product to the Sales Order

To add a product to the order, click on the  add icon in the products list to open the Add Product window. Search for the desired product, click the  add icon in the results list for the product you are adding, and click the OK button to close the Add Product window. The product is now added to the Sales Order document and the total cost of the order has been updated to reflect the changes.

To change the quantity of a product ordered, click on the Quantity field of the desired product in the Sales Order products list and enter a new value. The ordered quantity will be updated and the total price of the order will reflect the changes.

To give a discount on a specific product, click on the Disc. % field and enter a new value. The Disc. \$ field will automatically update to reflect the discounted amount. The total price of the order will also reflect the changes.

To remove a product from a Sales Order, click on the  delete icon for the product you want to remove.

Selecting a Shipping Service

If you would like to specify a shipping service, click on the  Shipping Service icon to open the Shipping Service Selection window.

A list of available shipping services will be displayed that are available for the destination shipping address.

Select the desired shipping service and click the OK button to attach the selected shipping service to the Sales Order and close the Shipping Service Selection window.

Once the window has closed the Sales Order will be updated and the Shipping field will display the cost of shipping. If you wish to change the Shipping cost, click on the Shipping field and enter a new value.

	Shipping Service	Price
	Customer Pickup	0.00
	UPS Next Day Air	68.68
	UPS Next Day Air Saver	61.74
	UPS 2nd Day Air	37.11
	UPS 3-Day Select	26.47
	UPS Ground	6.89

OK

Payment Method Selection

To change the desired payment method, click on the  payment method icon to open the payment method selection window. Select the desired payment method and click the OK button to attach the selected payment method to the sales order and close the payment method selection window.

Sales Rep Selection

To change the sales rep, click on the  sales rep icon to open the sales rep selection window. Select the desired sales rep and click the OK button to attach the selected sales rep to the sales order and close the sales rep selection window.

PO Number Reference Field

The PO Number field is a customer reference that will appear on printed sales orders and invoices. This field can contain any information at the customer's request.

Handling Fee

Changing the Handling fee is as simple as clicking on the Handling field and entering a new value. Once modifying this field the order total field will change to reflect the new amount.

Payments

To add a payment to the sales order, click on the  payment icon to open the payment window. There are three different payment types which are discussed below.

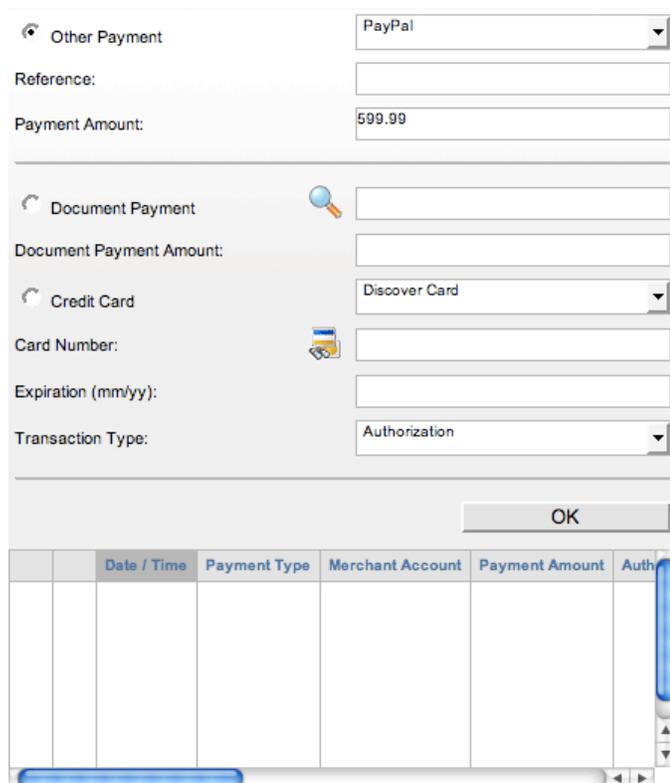
Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an Other Payment type payment select an Other Payment type from the pull down menu, enter an optional reference into the Reference field, enter the dollar amount, and click OK

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  Document Payment selection icon to open the Document Payment Selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the Document Payment Selection window. Click OK in the Payment window to apply the Document Payment.



The screenshot shows a payment selection window with three main sections:

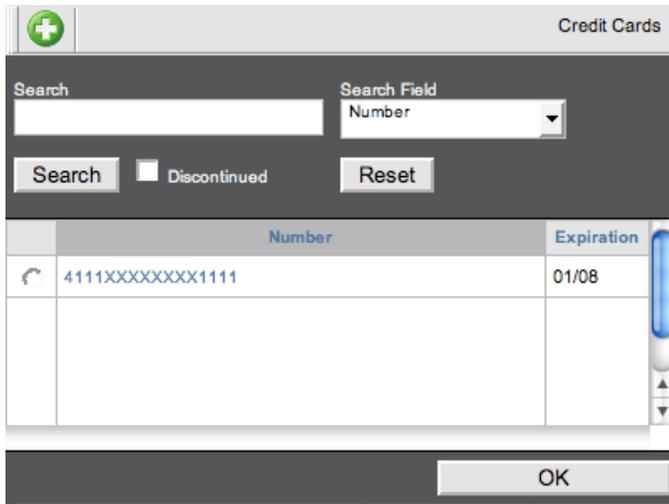
- Other Payment:** Includes a radio button, a dropdown menu set to "PayPal", a "Reference:" field, and a "Payment Amount:" field with the value "599.99".
- Document Payment:** Includes a radio button, a magnifying glass icon, and a search field.
- Credit Card:** Includes a radio button, a dropdown menu set to "Discover Card", a "Card Number:" field with a card icon, an "Expiration (mm/yy):" field, and a "Transaction Type:" dropdown menu set to "Authorization".

At the bottom of the window is an "OK" button and a table with the following columns: Date / Time, Payment Type, Merchant Account, Payment Amount, and Auth.

Credit Card Payments

To apply a Credit Card payment chose the Credit Card payment type and click on the  Credit Card Selection icon to open the Credit Card Selection window.

If the desired credit card is listed, select the credit card and click the OK button to close the Credit Card Selection window. The credit card information will now be displayed in the Payment window.



Number	Expiration
4111XXXXXXXX1111	01/08

To add a credit card, click on the  add icon to open the Add Credit Card window.

Enter the credit card details and click the Save button to save the credit card and close the Add Credit Card window. Select the newly added credit card from the Credit Card Selection window and click the OK button. The credit card information will now be displayed in the payment window.

Select either an Authorization or Sale Transaction Type. An Authorization will verify the funds are available from the customer's credit card and place them on hold. A Sale will verify the funds and place them in the current batch for settlement and deposit to your bank account.

To capture a previous credit card authorization, find the authorization in the payment list at the bottom of the Payment window. Click on the  add icon to capture the full dollar amount to be placed in the current batch for settlement and deposit to your bank account.

Creating Sales Invoices

Sales Invoice creation signifies completion of a Sales Order and receipt of the products or services by your customer. Since orders may be filled one product at a time, multiple Sales Invoices can be created from a single Sales Order. A Sales Invoice is a final record of a Sales transaction.

To create a Sales Invoice you first must open a Sales Order. Products that will be invoiced must be attached to the Sales Order prior to invoicing.

To attach non-inventory product, simply click on the Attached field for the corresponding product and enter the number of products that will be received by the customer.

Price	Quantity	Attached	Shipp
699.99	1	1	

To attach an inventory product, click on the Add Serial # field and either scan or manually enter the serial number. The attached field for the corresponding product will update to reflect the number of attached products.

Add Serial #:

To detach a serial number from a sales order, click on the  serial numbers icon to open the Serial Numbers window. Click on the  delete icon for the serial number you want removed.

Serial numbers can only be removed from a sales order document before they have been invoiced.

Once all products that will be received by the customer have been attached, click on the  create invoice icon to create the invoice. The sales order document will close and the sales invoice document will be displayed.

Sales Invoices

Since a Sales Invoice is a final record document, not much can be modified besides notes, payments, and creation of shipping labels.

Printing

To print a sales invoice, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for sales invoice printing.

Notes

To add or modify notes pertaining to this invoice, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this invoice is opened, check the Popup on document open checkbox.

Serial Numbers

To view all serial numbers associated with this sales invoice, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.



Offset
0

Height Adjustment
0

Print

7170214
P0000011

Checking Stock Status

To check the stock status of all products attached to this invoice, click on the  stock status icon to open the Stock Status window. A list of all products attached to this invoice will be shown along with their current stock status.

Creating Shipping Labels

To create a shipment for a sales invoice, click on the  ship icon to open the Shipping Window.

The shipping address and shipping service fields will be automatically populated. Simply enter the package weight and click the Ship button. The shipping label will be generated and you will be prompted with your web browser print dialog.



To cancel and void an existing shipment, click on the  delete icon for the corresponding shipment in the shipment list.

Payments

To add a payment to the sales invoice, click on the  payment icon to open the payment window. There are three different payment types which are discussed below.

Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an Other Payment type payment select an Other Payment type from the pull down menu, enter an optional reference into the Reference field, enter the dollar amount, and click OK

Date / Time	Payment Type	Merchant Account	Payment Amount	Auth

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  Document Payment selection icon to open the Document Payment Selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the Document Payment Selection window. Click OK in the Payment window to apply the Document Payment.

Credit Card Payments

To apply a Credit Card payment chose the Credit Card payment type and click on the  Credit Card Selection icon to open the Credit Card Selection window.

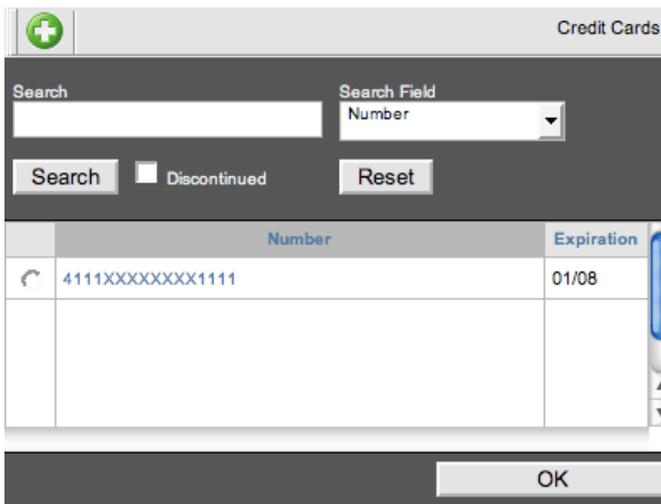
If the desired credit card is listed, select the credit card and click the OK button to close the Credit Card Selection window. The credit card information will now be displayed in the Payment window.

To add a new card, click on the  add icon to open the Add Credit Card window. Enter the credit card details and click the Save button to save the credit card and close the Add Credit Card

window. Select the newly added credit card from the Credit Card Selection window and click the OK button. The credit card information will now be displayed in the payment window.

Select either an Authorization or Sale Transaction Type. An Authorization will verify the funds are available from the customer's credit card and place them on hold. A Sale will verify the funds and place them in the current batch for settlement and deposit to your bank account.

To capture a previous credit card authorization, find the authorization in the payment list at the bottom of the Payment window. Click on the  to capture the full dollar amount to be placed in the current batch for settlement and deposit to your bank account.



Number	Expiration
4111XXXXXXXX1111	01/08

Customer Returns

To create a new customer return, open the Poseidon Administration Window and mouse-over the Sales icon. Select the Customer Return Browser option.

Creating a New Customer Return

Click on the  new customer return icon to open the customer return window. All new customer returns are created with a quote status. Once the new customer return is open, start by attaching a customer to the new customer return.

Printing

To print a customer return, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for customer return printing.

Notes

To add or modify notes pertaining to this customer return, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this customer return is opened, check the Popup on document open checkbox.

Attaching a Customer

If the customer already exists in the database, click on the  Select Customer icon to open the Select Customer window. Search for the existing customer, select the appropriate customer, and click the OK button.

If the customer does not already have an account in the database, click on the  Add Customer icon to open the Customer window. Enter the customer's information and click the Save button to add the new customer to the database and attach the new customer to the customer return.

Serial Numbers

To view all serial numbers associated with this customer return, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.



Checking Stock Status

To check the stock status of all products attached to this customer return, click on the  stock status icon to open the Stock Status window. A list of all products attached to this customer return will be shown along with their current stock status.

Specifying a Shipping Address

To change the shipping address, click on the  Select Address icon to open the Select Address window. This window will display all shipping addresses associated with your selected customer. If the shipping address is shown in the results list, select the appropriate address and click the OK button to attach this shipping address to the customer return.

If the desired shipping address is not shown in the results list, click on the  Add Address icon to open the Address window. Enter the customer's shipping address information and click the Save button to add the new customer shipping address to the database. The new shipping address will be displayed in the Select Address results list. Select the new address and click the OK button to attach this shipping address to the customer return.

Modifying the Order Date

To modify the Order Date, click on the  Order Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the order date will be updated.

Setting the Due Date

To modify the Due Date, click on the  Due Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the due date will be updated.

Changing the Order Status

If you would like to change the status of the order, simply select the desired order status from the Order Status pulldown menu.

Adding a Product to the Customer Return

To add a product to the order, click on the  add icon in the products list to open the Add Product window. Search for the desired product, click the  add icon in the results list for the product you are adding, and click the OK button to close the Add Product window. The product is

now added to the customer return document and the total cost of the order has been updated to reflect the changes.

To change the quantity of a product ordered, click on the Quantity field of the desired product in the customer return products list and enter a new value. The ordered quantity will be updated and the total price of the order will reflect the changes.

To give a discount on a specific product, click on the Disc. % field and enter a new value. The Disc. \$ field will automatically update to reflect the discounted amount. The total price of the order will also reflect the changes.

To remove a product from a customer return, click on the  delete icon for the product you want to remove.

Selecting a Shipping Service

If you would like to specify a shipping service, click on the  Shipping Service icon to open the Shipping Service Selection window.

A list of available shipping services will be displayed that are available.

Select the desired shipping service and click the OK button to attach the selected shipping service to the customer return and close the Shipping Service Selection window.

Once the window has closed the customer return will be updated and the Shipping field will display the cost of shipping. If you wish to change the Shipping cost, click on the Shipping field and enter a new value.

	Shipping Service	Price
	Customer Pickup	0.00
	UPS Next Day Air	68.68
	UPS Next Day Air Saver	61.74
	UPS 2nd Day Air	37.11
	UPS 3-Day Select	26.47
	UPS Ground	6.89

OK

Payment Method Selection

To change the desired payment method, click on the  payment method icon to open the payment method selection window. Select the desired payment method and click the OK button to attach the selected payment method to the customer return and close the payment method selection window.

Sales Rep Selection

To change the sales rep, click on the  sales rep icon to open the sales rep selection window. Select the desired sales rep and click the OK button to attach the selected sales rep to the customer return and close the sales rep selection window.

PO Number Reference Field

The PO Number field is a customer reference that will appear on printed customer returns and credits. This field can contain any information at the customer's request.

Handling Fee

Changing the Handling fee is as simple as clicking on the Handling field and entering a new value. Once modifying this field the order total field will change to reflect the new amount.

Creating Customer Credits

Customer credit creation signifies completion of a customer return and receipt of the returned products or services from your customer. Since returns may be credited one product at a time, multiple customer credits can be created from a single customer return. A customer credit is a final record of a customer return transaction.

To create a customer credit you first must open a customer return. Products that will be credited must be attached to the customer return prior to invoicing.

To attach non-inventory product, simply click on the Attached field for the corresponding product and enter the number of products that will be received by the customer.

Price	Quantity	Attached	Ship
699.99	1	1	

To attach an inventory product, click on the Add Serial # field and either scan or manually enter the serial number. The attached field for the corresponding product will update to reflect the number of attached products.

Add Serial #:

To detach a serial number from a customer return, click on the  serial numbers icon to open the Serial Numbers window. Click on the  delete icon for the serial number you want removed. Serial numbers can only be removed from a customer return document before they have been credited.

Once all products that will be received by the customer have been attached, click on the  create credit icon to create the invoice. The customer return document will close and the sales invoice document will be displayed.

Customer Credits

Since a customer credit is a final record document, not much can be modified besides notes and payments.

Printing

To print a customer credit, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for customer credit printing.

Notes

To add or modify notes pertaining to this customer credit, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this customer credit is opened, check the Pop up on document open checkbox.

Serial Numbers

To view all serial numbers associated with this customer credit, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Offset
0

Height Adjustment
0

Print

7170214
P0000011



Checking Stock Status

To check the stock status of all products attached to this customer credit, click on the  stock status icon to open the Stock Status window. A list of all products attached to this customer credit will be shown along with their current stock status.

Payments

To add a payment to the customer credit, click on the  payment icon to open the payment window. There are three different payment types which are discussed below.

Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an Other Payment type payment select an Other Payment type from the pull down menu, enter an optional reference into the Reference field, enter the dollar amount, and click OK

Other Payment PayPal

Reference:

Payment Amount:

Document Payment 

Document Payment Amount:

OK

Date / Time	Payment Type	Merchant Account	Payment Amount	Auth

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  Document Payment selection icon to open the Document Payment Selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the Document Payment Selection window. Click OK in the Payment window to apply the Document Payment.

Purchasing

Poseidon streamlines purchasing procedures by maintaining vendor contacts, purchase history, vendor credits, payment history, and auto-generating purchase orders for inventory items.

A vendor is a business from which you purchase the products that you sell to your customers. A Purchase Order is a documented request made to a vendor for products or services. Purchase orders are assigned an order status based on their stage within the order process. There are four different purchase order status types:

1. Canceled - A canceled purchase order is no longer valid. Canceled purchase orders will no longer be processed and products attached will not be counted as on order when inventory status is checked. After some time the canceled order number will be recycled into the system and used for a new sales order or purchase order document. Modifications can be made at any time to a canceled purchase order.
2. Quote - A purchase quote is a document which reflects an estimated cost. Products attached to a purchase quote will not be counted as on order when inventory status is checked. Purchase quotes will remain in the system indefinitely until the order status is changed either to canceled or pending. Modifications can be made at any time to a purchase quote.
3. Pending - A pending purchase order is an order that has been requested to be fulfilled by a vendor. Any products attached to a pending purchase order will show the number on order when inventory status is checked. Modifications can be made at any time to a pending purchase order.
4. Complete - A complete purchase order has been finalized and is no longer outstanding in the system. Products attached to a complete purchase order will no longer be counted as on order when inventory status is checked. Since complete purchase orders signify a final record of the transaction, no modifications can be made once the order has been completed. Completed purchase orders will have one or more associated purchase invoice documents.

A purchase invoice is a final record of a purchasing transaction. Purchase invoices are associated with their corresponding purchase orders. Since purchase orders can be partially received, multiple purchase invoices can be associated with a single purchase order. Any payment made on a purchase order is applied to the purchase invoice upon creation. Balance due on any purchase invoice reflects the total balance due for that portion of the vendor's purchase order.

Vendors

To add a new vendor, open the Poseidon Administration Window and mouse-over the Purchasing icon. Select the Vendor Browser option.

Click on the  add customer icon to open the vendor window. The following is a reference for each of the fields in the customer window:

- First Name: The first name of your vendor contact.
- Last Name: The last name of your vendor contact.
- Company: The company name of the vendor.
- Daytime Phone: The phone number where the vendor can be reached during the daytime.
- Evening Phone: The phone number where the vendor can be reached during the evening.
- Fax: The vendor fax number.
- E-Mail: The vendor's e-mail address.
- Address 1: The vendor's street address.
- Address 2: The vendor's street address.
- City: The vendor's address city.
- State: The vendor's address state.
- Zipcode: The vendor's address postal code.
- Country: The vendor's address country.



The screenshot shows a vendor form with the following fields: First Name, Last Name, Company, Daytime Phone, Evening Phone, Fax, E-Mail, Address 1, Address 2, City, State (dropdown), Zipcode, and Country (dropdown). At the bottom are buttons for 'Set Password' and 'Save'. A notes icon is visible in the top right corner of the form area.

Click on the  Notes icon to open the notes window and enter any additional information about the vendor. Click on the Set Password button to display the password field and set the password for the vendor to login to your web store. Click on the Save button to save your new vendor and close the vendor window.

Purchase Orders

To create a new purchase order, open the Poseidon Administration Window and mouse-over the Purchasing icon. Select the Purchase Order Browser option.

Creating a New Purchase Order

Click on the  new purchase order icon to open the purchase order window. All new purchase orders are created with quote order status. Once the new purchase order is open, start by attaching a vendor.

Printing

To print a purchase order, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for purchase order printing.

Notes

To add or modify notes pertaining to a purchase order, click on the  notes icon to open the notes window. Enter your info into the notes field. Check the Popup on document open checkbox if you want the notes field to popup every time this purchase order is opened,.

Attaching a Vendor

If the vendor already exists in the database, click on the  select vendor icon to open the select vendor window. Search for the existing vendor, select the appropriate vendor, and click the OK button.

If the vendor does not already have an account in the database, click on the  add vendor icon to open the vendor window. Enter the vendor information and click the Save button to add the new vendor to the database and attach the new vendor to the purchase order.

Serial Numbers

To view all serial numbers associated with this purchase order, click on the  serial numbers icon to open the serial numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the serial number window. Serial numbers should be printed on Avery label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Checking Stock Status

To check the stock status of all products attached to this purchase order, click on the  stock status icon to open the Stock Status window. A list of all products attached to this purchase order will be shown along with their current stock status.

Specifying a Shipping Address

To change the shipping address, click on the  select address icon to open the select address window. This window will display all shipping addresses associated with your selected vendor. If the shipping address is shown in the results list, select the appropriate address and click the OK button to attach this shipping address to the purchase order.

If the desired shipping address is not shown in the results list, click on the  add address icon to open the address window. Enter the vendor's shipping address information and click the Save button to add the new vendor shipping address to the database. The new shipping address will be displayed in the select address results list. Select the new address and click the OK button to attach this shipping address to the purchase order.

Modifying the Order Date

To modify the order date, click on the  order date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the order date will be updated.

Setting the Due Date

To modify the due date, click on the  Due Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the due date will be updated.

Changing the Order Status

If you would like to change the status of the order, simply select the desired order status from the order status pulldown menu.

Adding a Product to the Purchase Order

To add a product to the order, click on the  add icon in the products list to open the add product window. Search for the desired product, click the  add icon in the results list for the product you are adding, and click the OK button to close the add product window. The product is now added to the purchase order document and the total cost of the order has been updated to reflect the changes.

To change the quantity of a product ordered, click on the quantity field of the desired product in the purchase order products list and enter a new value. The ordered quantity will be updated and the total price of the order will reflect the changes.

To give a discount on a specific product, click on the Disc. % field and enter a new value. The Disc. \$ field will automatically update to reflect the discounted amount. The total price of the order will also reflect the changes.

To remove a product from a purchase order, click on the  delete icon for the product you want to remove.

Selecting a Shipping Service

If you would like to specify a shipping service, click on the  shipping service icon to open the shipping service Selection window.

A list of available shipping services will be displayed that are available for the destination shipping address.

Select the desired shipping service and click the OK button to attach the selected shipping service to the purchase order and close the shipping service selection window.

Once the window has closed the purchase order will be updated and the shipping field will display the cost of shipping. If you wish to change the shipping cost, click on the shipping field and enter a new amount.

Payment Method Selection

To change the desired payment method, click on the  payment method icon to open the payment method selection window. Select the desired payment method and click the OK button to attach the selected payment method to the purchase order and close the payment method selection window.

Purchaser Selection

To change the purchaser, click on the  purchaser icon to open the purchaser selection window. Select the desired purchaser and click the OK button to attach the selected purchaser to the purchase order and close the purchaser selection window.

Reference Field

The reference field is a customer reference that will appear on printed sales orders and invoices. This field can contain any information at the customer's request.

Handling Fee

Changing the Handling fee is as simple as clicking on the Handling field and entering a new value. Once modifying this field the purchase order total field will change to reflect the new amount.

Payments

To add a payment to the purchase order, click on the  payment icon to open the payment window. There are two different payment types which are discussed below.

Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an other payment type payment select an other payment type from the pull down menu, enter an optional reference into the reference field, enter the dollar amount, and click OK

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  document payment selection icon to open the document payment selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the document payment selection window. Click OK in the payment window to apply the document payment.

Creating Purchase Invoices

Purchase invoice creation signifies completion of a purchase order and receipt of the products or services by your customer. Since orders may be filled one product at a time, multiple Sales Invoices can be created from a single Sales Order. A Sales Invoice is a final record of a Sales transaction.

To create a Sales Invoice you first must open a Sales Order. Products that will be invoiced must be attached to the Sales Order prior to invoicing.

To attach non-inventory product, simply click on the Attached field for the corresponding product and enter the number of products that will be received by the customer.

To attach an inventory product, click on the Add Serial # field and either scan or manually enter the serial number. The attached field for the corresponding product will update to reflect the number of attached products.

To detach a serial number from a sales order, click on the  serial numbers icon to open the Serial Numbers window. Click on the  delete icon for the serial number you want removed. Serial numbers can only be removed from a sales order document before they have been invoiced.

Once all products that will be received by the customer have been attached, click on the  create invoice icon to create the invoice. The sales order document will close and the sales invoice document will be displayed.

Sales Invoices

Since a Sales Invoice is a final record document, not much can be modified besides notes, payments, and creation of shipping labels.

Printing

To print a sales invoice, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for sales invoice printing.

Notes

To add or modify notes pertaining to this invoice, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this invoice is opened, check the Pop up on document open checkbox.

Serial Numbers

To view all serial numbers associated with this sales invoice, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Checking Stock Status

To check the stock status of all products attached to this invoice, click on the  stock status icon to open the Stock Status window. A list of all products attached to this invoice will be shown along with their current stock status.

Creating Shipping Labels

To create a shipment for a sales invoice, click on the  ship icon to open the Shipping Window.

The shipping address and shipping service fields will be automatically populated. Simply enter the package weight and click the Ship button. The shipping label will be generated and you will be prompted with your web browser print dialog.

To cancel and void an existing shipment, click on the  delete icon for the corresponding shipment in the shipment list.

Payments

To add a payment to the sales invoice, click on the  payment icon to open the payment window. There are three different payment types which are discussed below.

Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an Other Payment type payment select an Other Payment type from the pull down menu, enter an optional reference into the Reference field, enter the dollar amount, and click OK

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  Document Payment selection icon to open the Document Payment Selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the Document Payment Selection window. Click OK in the Payment window to apply the Document Payment.

Credit Card Payments

To apply a Credit Card payment chose the Credit Card payment type and click on the  Credit Card Selection icon to open the Credit Card Selection window.

If the desired credit card is listed, select the credit card and click the OK button to close the Credit Card Selection window. The credit card information will now be displayed in the Payment window.

To add a new card, click on the  add icon to open the Add Credit Card window. Enter the credit card details and click the Save button to save the credit card and close the Add Credit Card window. Select the newly added credit card from the Credit Card Selection window and click the OK button. The credit card information will now be displayed in the payment window.

Select either an Authorization or Sale Transaction Type. An Authorization will verify the funds are available from the customer's credit card and place them on hold. A Sale will verify the funds and place them in the current batch for settlement and deposit to your bank account.

To capture a previous credit card authorization, find the authorization in the payment list at the bottom of the Payment window. Click on the  add icon to capture the full dollar amount to be placed in the current batch for settlement and deposit to your bank account.

Customer Returns

To create a new customer return, open the Poseidon Administration Window and mouse-over the Sales icon. Select the Customer Return Browser option.

Creating a New Customer Return

Click on the  new customer return icon to open the customer return window. All new customer returns are created with a quote status. Once the new customer return is open, start by attaching a customer to the new customer return.

Printing

To print a customer return, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for customer return printing.

Notes

To add or modify notes pertaining to this customer return, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this customer return is opened, check the Pop up on document open checkbox.

Attaching a Customer

If the customer already exists in the database, click on the  Select Customer icon to open the Select Customer window. Search for the existing customer, select the appropriate customer, and click the OK button.

If the customer does not already have an account in the database, click on the  Add Customer icon to open the Customer window. Enter the customer's information and click the Save button to add the new customer to the database and attach the new customer to the customer return.

Serial Numbers

To view all serial numbers associated with this customer return, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Checking Stock Status

To check the stock status of all products attached to this customer return, click on the  stock status icon to open the Stock Status window. A list of all products attached to this customer return will be shown along with their current stock status.

Specifying a Shipping Address

To change the shipping address, click on the  Select Address icon to open the Select Address window. This window will display all shipping addresses associated with your selected customer. If the shipping address is shown in the results list, select the appropriate address and click the OK button to attach this shipping address to the customer return.

If the desired shipping address is not shown in the results list, click on the  Add Address icon to open the Address window. Enter the customer's shipping address information and click the Save button to add the new customer shipping address to the database. The new shipping address will be displayed in the Select Address results list. Select the new address and click the OK button to attach this shipping address to the customer return.

Modifying the Order Date

To modify the Order Date, click on the  Order Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the order date will be updated.

Setting the Due Date

To modify the Due Date, click on the  Due Date calendar icon to open the date selection window. Click on the corresponding date and the date selection window will be closed and the due date will be updated.

Changing the Order Status

If you would like to change the status of the order, simply select the desired order status from the Order Status pulldown menu.

Adding a Product to the Customer Return

To add a product to the order, click on the  add icon in the products list to open the Add Product window. Search for the desired product, click the  add icon in the results list for the product you are adding, and click the OK button to close the Add Product window. The product is now added to the customer return document and the total cost of the order has been updated to reflect the changes.

To change the quantity of a product ordered, click on the Quantity field of the desired product in the customer return products list and enter a new value. The ordered quantity will be updated and the total price of the order will reflect the changes.

To give a discount on a specific product, click on the Disc. % field and enter a new value. The Disc. \$ field will automatically update to reflect the discounted amount. The total price of the order will also reflect the changes.

To remove a product from a customer return, click on the  delete icon for the product you want to remove.

Selecting a Shipping Service

If you would like to specify a shipping service, click on the  Shipping Service icon to open the Shipping Service Selection window.

A list of available shipping services will be displayed that are available.

Select the desired shipping service and click the OK button to attach the selected shipping service to the customer return and close the Shipping Service Selection window.

Once the window has closed the customer return will be updated and the Shipping field will display the cost of shipping. If you wish to change the Shipping cost, click on the Shipping field and enter a new value.

Payment Method Selection

To change the desired payment method, click on the  payment method icon to open the payment method selection window. Select the desired payment method and click the OK button to attach the selected payment method to the customer return and close the payment method selection window.

Sales Rep Selection

To change the sales rep, click on the  sales rep icon to open the sales rep selection window. Select the desired sales rep and click the OK button to attach the selected sales rep to the customer return and close the sales rep selection window.

PO Number Reference Field

The PO Number field is a customer reference that will appear on printed customer returns and credits. This field can contain any information at the customer's request.

Handling Fee

Changing the Handling fee is as simple as clicking on the Handling field and entering a new value. Once modifying this field the order total field will change to reflect the new amount.

Creating Customer Credits

Customer credit creation signifies completion of a customer return and receipt of the returned products or services from your customer. Since returns may be credited one product at a time, multiple customer credits can be created from a single customer return. A customer credit is a final record of a customer return transaction.

To create a customer credit you first must open a customer return. Products that will be credited must be attached to the customer return prior to invoicing.

To attach non-inventory product, simply click on the Attached field for the corresponding product and enter the number of products that will be received by the customer.

To attach an inventory product, click on the Add Serial # field and either scan or manually enter the serial number. The attached field for the corresponding product will update to reflect the number of attached products.

To detach a serial number from a customer return, click on the  serial numbers icon to open the Serial Numbers window. Click on the  delete icon for the serial number you want removed. Serial numbers can only be removed from a customer return document before they have been credited.

Once all products that will be received by the customer have been attached, click on the  create credit icon to create the invoice. The customer return document will close and the sales invoice document will be displayed.

Customer Credits

Since a customer credit is a final record document, not much can be modified besides notes and payments.

Printing

To print a customer credit, click on the  print icon. You will be prompted with your web browser print dialog. Adobe Flash Player 9 or greater is required for customer credit printing.

Notes

To add or modify notes pertaining to this customer credit, click on the  notes icon to open the notes window. Enter your info into the Notes field. If you want the notes field to popup every time this customer credit is opened, check the Pop up on document open checkbox.

Serial Numbers

To view all serial numbers associated with this customer credit, click on the  serial numbers icon to open the Serial Numbers window.

To print all auto-generated serial numbers in the list, click on the  print icon from the Serial Number window. Serial numbers should be printed on Avery Label #5267 or compatible label sheets.

Offset defines how many labels to skip before rendering the first barcode label. This allows you to reuse sheets of Avery labels that are only partially used. If the first 8 labels on a sheet are used, set your Offset to 8 and the labels will begin printing on the 9th label.

Height adjustment can be a positive or negative number representing how many pixels up or down to move the top margin. This is useful for some printers that do not align the barcodes to the Avery labels properly.

Checking Stock Status

To check the stock status of all products attached to this customer credit, click on the  stock status icon to open the Stock Status window. A list of all products attached to this customer credit will be shown along with their current stock status.

Payments

To add a payment to the customer credit, click on the  payment icon to open the payment window. There are three different payment types which are discussed below.

Other Payments

Other payment methods are usually Cash, Personal Checks, Money Orders, and Wire Transfers, or PayPal. To apply an Other Payment type payment select an Other Payment type from the pull down menu, enter an optional reference into the Reference field, enter the dollar amount, and click OK

Document Payments

A document payment is a credit that can be applied to the document. Poseidon maintains an accounting of balance between order, invoice, return, and credit documents.

Click on the  Document Payment selection icon to open the Document Payment Selection window. Any documents that can be applied will be listed. Select the the desired document and click OK to close the Document Payment Selection window. Click OK in the Payment window to apply the Document Payment.