

eSales Center User Guide



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eSales Center

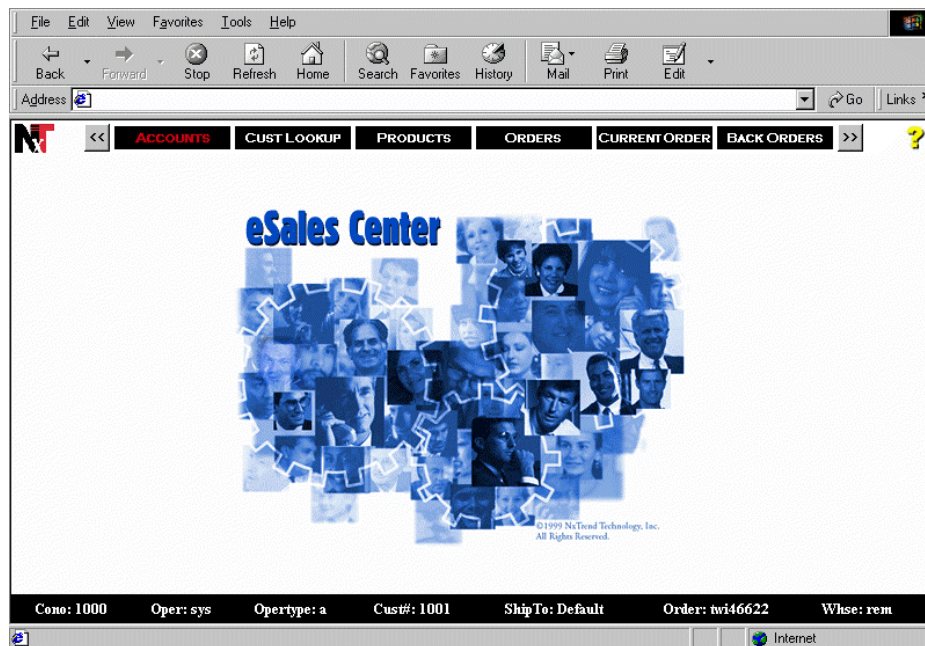
- Using eSales Center
- Accessing eSales Center
- The Current Session
- Orders
- Performing Searches

Using eSales Center

This section will explain the basic functions of eSales Center and how to use it. Since the eSales Center templates are customizable, the format in which the information displays on your web site may be different than the examples shown.

Menu Options

When you click on a menu item from eSales Center, such as Accounts, the requested information is retrieved from your distributor's host system and displayed to you.



The menu options in eSales Center are as follows.

Option	Description
Accounts	This function allows you to inquire on your account.
Products	This function allows you to search for product numbers, descriptions, and availability.
Orders	This function allows you to inquire about past and present orders.
Current Order	This function allows you to place your order or enter a quote.
Back Orders	This function displays current back orders.
Session Info	This function allows you to view current session information, change the default ship to, warehouse number, or page size for this session.

Accessing eSales Center

Accessing eSales Center requires a company number, operator initials and an operator password. The administrator sets up operators using the information provided by you through an email. While waiting for your login information, you can gain access to product information by entering **wiiq** in the Operator Initial and Password boxes.

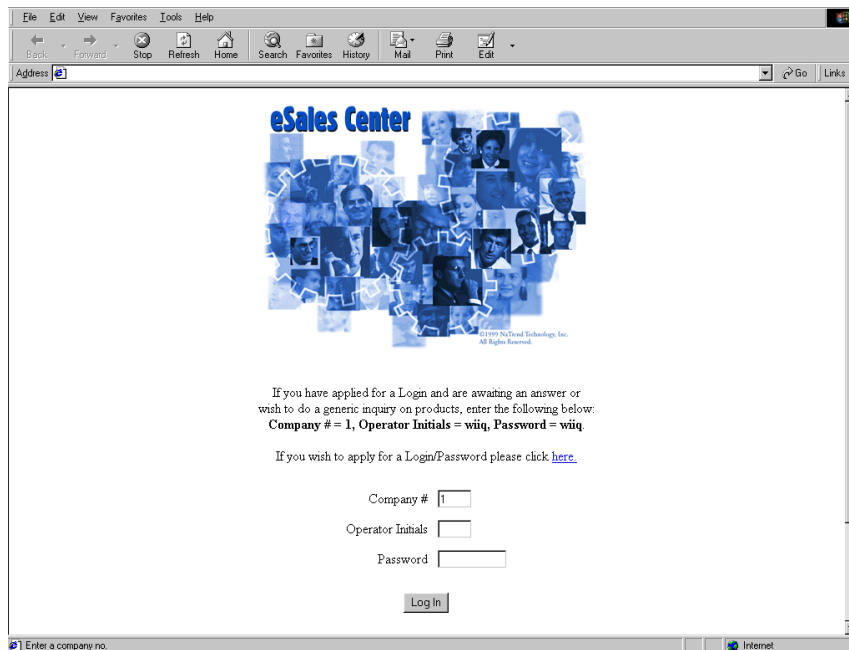
The following tasks are explained in this section:

- ◆ Requesting an eSales Center login
- ◆ Logging on to eSales Center

Requesting an eSales Center login

To request a login and password follow the steps below.

- 1 Access eSales Center. The following window displays:



- 2 Click [here](#) to apply for a login and password. The following window displays:

The screenshot shows a web browser window with the title "eSales Center - New Account Request Form". The browser's address bar is empty. The page content includes a heading "eSales Center - New Account Request Form", a prompt "Please enter the required information:", and a list of required fields: "NAME, COMPANY NAME, PHONE NUMBER". Below this, it says "Thanks!" and lists the fields to be filled: "Your Name:", "Company:", "Office Phone Number:", "Office Fax number:", and "Your Email address:". Each field has a corresponding text input box. A "Send Mail" button is located below the email field. At the bottom, there is a link: "If you have already applied for a Login/Password, press here and login as 'WIIQ' password 'WIIQ'. [Login](#)". The browser's status bar shows "Done" and "Internet".

- 3 Enter your name, company name, office telephone number, fax number, and your email address.
- 4 Click Send Mail and an email notification will be sent to the administrator. After you have requested an eSales Center login, the administrator will send you all the information you need to begin using eSales Center.

Logging on to eSales Center

Follow the steps below to log on to eSales Center.

- 1 Access eSales Center. The following window displays:

The screenshot shows a web browser window displaying the eSales Center login page. The page features a large graphic with the text "eSales Center" and a collage of people's faces. Below the graphic, there is a copyright notice: "© 1999 National Technology, Inc. All Rights Reserved." The page contains the following text: "If you have applied for a Login and are awaiting an answer or wish to do a generic inquiry on products, enter the following below: **Company # = 1, Operator Initials = wiiq, Password = wiiq**". Below this, it says: "If you wish to apply for a Login/Password please click [here](#)." There are three input fields: "Company #", "Operator Initials", and "Password". A "Log In" button is located below the password field. The browser's status bar shows "Enter a company no." and "Internet".

- 2** Enter your company number, operator initials, and password.
- 3** Click Log In. You now have access to the functions in eSales Center by using the menu bar at the top of the window.

The Current Session

The Session Information window displays information about the active session, such as company number, operator, default ship to and warehouse. Each session lasts until the browser is closed. This window not only displays the current session information, it also contains boxes so that you can change session default information. Any session information that is changed is only valid for the current session.

Displaying or changing current session information

- 1 Click Session Info on the menu bar. The Session Information window displays.

The screenshot shows a web browser window with the address bar displaying a URL. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains buttons for Back, Forward, Stop, Refresh, Home, Search, Favorites, History, Mail, Print, and Edit. The address bar has a search icon, a Go button, and a Links button. The main content area displays the Session Information window. The window has a title bar with a red 'X' icon and a menu bar with the following options: <<, PRODUCTS, ORDERS, CURRENT ORDER, BACK ORDERS, SESSION INFO (highlighted), OPERATORS, and >>. The main content area is titled 'Session Information' and contains the following fields: Company: 1000, Working Cust#: 1001, Customer#: 1001, Current Order:, Operator: sys, Ship To: Default (dropdown), Operator Type: Customer, Warehouse: main (dropdown), Page Size: display 8 records on each page, Admin Email: support@roofs.com, and Sales Email: jsmith@roofs.com. At the bottom of the main content area are two buttons: Update Session Parameters and Reset. The footer of the window displays the following information: Cono: 1000, Oper: sys, Opertype: a, Cust#: 1001, ShipTo: Default, Order:, and Whse: rem. The status bar at the bottom of the browser window displays 'Enter a customer no. (Required)' and 'Internet'.

- 2 Select a ship to from the Ship To box.
- 3 Select a warehouse from the Warehouse box.
- 4 Enter the page size. The page size determines how many lines will display on the eSales Center window during this session. Eight (8) lines is the default.
- 5 Click Update Session Parameters and all information you entered will take effect or click Reset and all information changed will revert to the original defaults.

Orders

This section describes tasks related to orders, such as placing orders and performing order inquiries. The Current Order window is where you enter your order, place quotes, add order notes and line comments.

The following tasks are described in this chapter:

- ♦ Entering an order
- ♦ Canceling an order
- ♦ Inquiring on a present/past order
- ♦ Inquiring on a back order
- ♦ Entering a quote
- ♦ Adding/Deleting notes
- ♦ Adding/Deleting comments

The Current Order Window

Use the Current Order window to enter an order. You will be able to place an order or quote, and change information, such as purchase order number, or request date. The Current Order Display window is divided into three different sections.

Header Section

The first section, the order header, is the billing and default shipping information for the order. Enter your ship to, purchase order number, type of order, etc., into these boxes. When you change information in the left panel, new defaults will overwrite the defaults in the right panel; therefore, make changes to the left panel first.

Header Section

Bill To:	Hypo Drive Inc. 5541 Northern Main Street Durango , CO 84512	NOTE: Defaults are based on Ship To. Verify/Change Ship To BEFORE updating.	PO	<input type="text"/>
	Ship To:		Order Type	SO - Sales Order ▼
	Default - Hypo Drive Inc. ▼ Update Ship To		Requested	05/07/99
	Hypo Drive Inc. 5541 Northern Main Street		Reference	<input type="text"/>
	<input type="text"/> Durango , CO		Ship Via	upsg - UPS Grd-Comm ▼
	84512		Instructions	<input type="text"/>
	No Orders for Other Warehouses and Ship To		Disposition	N - Normal ▼
			Warehouse	rem - Remote Warehouse ▼
			Entered	05/07/99
			Apply Changes to Above Fields	

If you have more than one current order, there will be a selection list

Left Panel **Right Panel**

Updating header information

It is important that you confirm your header information before you begin to add products to your order. You will not be able to access some of the boxes, such as Warehouse, after products have been added.

- 1 If you have multiple existing, select the order you wish to work on from the Other Warehouses box.
- 2 Enter any changes to the Ship to. Click Update Ship To.
- 3 Update or accept the ship to address default.
- 4 Enter a PO if required.
- 5 Select an order type.
- 6 Enter a requested date.
- 7 Enter a reference if desired.
- 8 From the Ship Via box, select a shipping method. Enter any shipping instructions if desired.
- 9 From the Disposition box, select a product disposition, such as normal, just in time, ship complete, tag and hold, or will call.
- 10 Enter or accept the warehouse default.
- 11 Click Apply Changes to Above Fields.

Order Display Section

The second section is the Order Display section. After a product has been entered in the Product Entry section or selected using the product searches, it displays in this section.

Click Add or Modify Order Notes to add or change order notes. Click com in the Line column to add, delete or modify comments to line items. Click the product number to go to the Item Order/Inquiry window, which displays product information, such as available quantity, price, order minimum, unit of measure and allows you to change the product quantity. Click a description, if hyper-linked, for additional information such as vendor web links, product specifications and/or product pictures. Click the product quantity to change the product quantity or delete the line by changing the quantity to zero.

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
1 com	1124885	1 1/2" Pvc Dwv P Trap Nibco	6	0	each	8.36	0.00 %	50.16
2 com	1124807	1 1/2" Pvc Dwv 90' Ell Hub x Hub Nibco	3	0	each	2.40	0.00 %	7.20
3 com	24807	2" Pvc Dwv 90' Ell Hub x Hub Nibco	25	0	each	3.03	0.00 %	75.75
4 com	34807	3" Pvc Dwv 90' Ell Hub x Hub Nibco	7	0	each	9.42	0.00 %	65.94
5 com	1124885	1 1/2" Pvc Dwv P Trap Nibco	7	0	each	8.36	0.00 %	58.52

Product Entry Section

The third section is the Product Entry section. Use this section to enter the products you want to order. Enter the product's part number and quantity, clicking GO after each product. If you do not know the product number, access the Product Inquiry window to search for a list of products and the corresponding product number. After you press GO on a line, the order total displays. You can continue entering products, place the order or delete the order.

Add Product to Order:

Qty:

Go

Total 30.00

Delete Order

Place Order

The Place Order button will put the items you have in this *Current Order* on order with **JLC Company**.

WARNING: Once you click Place Order you will not be able to delete the order using Delete Order. After you close eSales center, a created order that was not placed or deleted will, display next time you open eSales Center.

Entering an order

Follow the steps below to place an order.

- 1 Click Current Order from the menu bar. The Current Order window displays.

- 2 If you have another order in progress, select the order from the Orders for Other Warehouses and Ship To. (A selection box will display when there are multiple orders present.)
- 3 From the header section of the window, make any changes to the left panel then click Update Ship To if you make changes to the ship to address. Next, make changes to the right panel and click Apply Changes to Above Fields.

Note: You may only be able to enter quote orders. If this is the case, then the Order Type box will default QU-Quote order and you will not be able to change the order type.

- 4 Enter a product number in the Add Product to Order box. If you do not know the product number, access the Product Inquiry window by clicking Products. Refer to the section on performing Searches in this chapter for more information about product inquiries.
- 5 Enter a product quantity in the Qty box.
- 6 Click GO to add each product to your order.
- 7 Repeat steps 4 - 6 until all products are entered.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS **CURRENT ORDER** BACK ORDERS

Current Order - twi34132

You have items in your shopping basket.

Bill To:

Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

Default - Hypo Drive Inc.

Update Ship To

Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

Ship To:

NOTE: Defaults are based on Ship To. Verify/Change Ship To BEFORE updating.

P.O.

Order Type

Requested

Reference

Ship Via

Instructions

Disposition

Warehouse

Entered

Apply Changes to Above Fields

No Orders for Other Warehouses and Ship To

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
1	com 1124885	1 1/2" Pvc Dww P Trap Nibco	6	0	each	8.36	0.00 %	50.16
2	com 1124807	1 1/2" Pvc Dww 90° Ell Hub x Hub Nibco	3	0	each	2.40	0.00 %	7.20
3	com 24807	2" Pvc Dww 90° Ell Hub x Hub Nibco	25	0	each	3.03	0.00 %	75.75
4	com 34807	3" Pvc Dww 90° Ell Hub x Hub Nibco	7	0	each	9.42	0.00 %	65.94
5	com 1124885	1 1/2" Pvc Dww P Trap Nibco	7	0	each	8.36	0.00 %	58.52

Add Product to Order: Qty: Go

Total 257.57

Delete Order Place Order

The Place Order button will put the items you have in this *Current Order* on order with JLC Company.

Comp: 1000 Oper: sf2 Opertype: a Cust#: 1001 ShipTo: Default Order: twi34132 Whse: rem

Enter a product no. Internet

- Click Place Order. The Order Details window displays with your order number at the top as shown in the following window, or click Delete Order if you need to cancel the order. You will be asked to confirm your decision. After doing so, the Current Order window and a confirmation will display. If you want to delete a line, change the product quantity to zero. You cannot delete an order once it is placed.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address Go Links

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS **CURRENT ORDER** BACK ORDERS

Order Details for Stock Order 2000175-00

Copy lines, including quantities to Current Order

Bill To:	Hypo Drive Inc. 5541 Northern Main Street Durango, CO 84512	Ship To:	Default - Hypo Drive Inc. 5541 Northern Main Street Durango, CO 84512
Warehouse	rem	Instructions	
Ship Via	UPS Grd-Comm	Terms	2% 10 Net 30
Entered	05/29/99	Shipped	Requested 05/31/99
PO		View Order Notes	

Line	Product	Description	Quantity			UOM	Price	Extended
			Order	Ship	B/O			
1	1124885	1 1/2" Pvc Dwv P Trap Nibco	6	0	6	each	8.36	50.16
2	1124807	1 1/2" Pvc Dwv 90' Ell Hub x Hub Nibco	3	0	3	each	2.40	7.20
3	24807	2" Pvc Dwv 90' Ell Hub x Hub Nibco	25	0	25	each	3.03	75.75
4	34807	3" Pvc Dwv 90' Ell Hub x Hub Nibco	7	0	7	each	9.42	65.94
5	1124885	1 1/2" Pvc Dwv P Trap Nibco	7	0	7	each	8.36	58.52
Whole Order Discount								0.00
Subtotal								257.57
Taxes								0.00
Total								257.57

Conn: 1000 Oper: s02 Opertype: a Cust#: 1001 ShipTo: Default Order: Whse: rem

Canceling an order

Once an order has been placed through eSales Center, it cannot be canceled from eSales Center.

Placing a quote

A quote order allows you to receive prices on products without actually submitting an order. A quote is entered like an order: substitutes that are established are displayed on the quote. However, a quote has no effect on inventory or account balances. It must be converted to a regular Stock order by your sales representative before it impacts your account balance.

- 1 Click Current Order from the menu bar. The Current Order window displays.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS CURRENT ORDER BACK ORDERS

Current Order - twi43275

You do not have anything on order yet.

Bill To:

Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

Default - Hypo Drive Inc.

Update Ship To

Ship To:

Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

No Orders for Other Warehouses and Ship To

NOTE: Defaults are based on Ship To. Verify/Change Ship To BEFORE updating.

PO

Order Type SO - Sales Order

Requested 05/31/99

Reference

Ship Via upsg - UPS Grd-Comm

Instructions

Disposition N - Normal

Warehouse rem - Remote Warehouse

Entered 05/29/99

Apply Changes to Above Fields

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
Add Product to Order: <input type="text"/> Qty: <input type="text"/> Go								
Total								0.00

Comp: 1000 Oper: sf2 Oper type: a Cust#: 1001 Ship To: Default Order: twi43275 Whse: rem

Enter a product no. Internet

- 2 Make any changes to the left panel of the header section first. Click Update Ship To if you have changed the ship to address.
- 3 In the right panel of the header section, select QU-Quote Order in the Order Type box. Make any other changes necessary to the right panel of the window. If can only place a quote, this box will automatically default as 'QU' and you will not be able to change the order type.
- 4 Click Apply Changes to Above boxes and all changes made will take effect.
- 5 Enter a product number in the Add Product to Order box. If you do not know the product number, access the Product Inquiry window by clicking Products from the menu bar. Refer to the section on Performing a Search in this chapter for more information about product inquiries.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address Go Links

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS **CURRENT ORDER** BACK ORDERS

Current Order - twi34132

You have items in your shopping basket.

Bill To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

Default - Hypo Drive Inc.

Update Ship To

Ship To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

No Orders for Other Warehouses and Ship To

NOTE: Defaults are based on Ship To.
Verify/Change Ship To BEFORE updating.

PO

Order Type

Requested

Reference

Ship Via

Instructions

Disposition

Warehouse

Entered

Apply Changes to Above Fields

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
1	com 1124885	1 1/2" Pvc Dww P Trap Nibco	6	0	each	8.36	0.00 %	50.16
2	com 1124807	1 1/2" Pvc Dww 90° Ell Hub x Hub Nibco	3	0	each	2.40	0.00 %	7.20
3	com 24807	2" Pvc Dww 90° Ell Hub x Hub Nibco	25	0	each	3.03	0.00 %	75.75
4	com 34807	3" Pvc Dww 90° Ell Hub x Hub Nibco	7	0	each	9.42	0.00 %	65.94
5	com 1124885	1 1/2" Pvc Dww P Trap Nibco	7	0	each	8.36	0.00 %	58.52

Add Product to Order: Qty: Go

Total 257.57

Delete Order Place Order

The Place Order button will put the items you have in this Current Order on order with JLC Company.

Comp: 1000 Oper: st2 Opertype: a Cust#: 1001 ShipTo: Default Order: twi34132 Whse: rem

Enter a product no. Internet

- 6 Enter a product quantity.
- 7 Click GO.
- 8 Repeat steps 5 - 7 until all products have been added to the order.
- 9 Click Place Order to place your quote.
- 10 Click Delete Order if you wish to cancel the quote. You will be asked to confirm your decision. Once you do, you will return to the main window and an order confirmation will display at the bottom of the window.
- 11 Click Place Order when you are finished adding products to your order. You will receive a quote confirmation similar to the following.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address

<< CUST LOOKUP PRODUCTS ORDERS CURRENT ORDER BACK ORDERS SESSION INFO >> ?

Order Details for Quote 2000172-00

Copy lines, including quantities to Current Order

Bill To:	Hypo Drive Inc. 5541 Northern Main Street Durango, CO 84512	Ship To:	Default - Hypo Drive Inc. 5541 Northern Main Street Durango, CO 84512
Warehouse	rem	Instructions	
Ship Via	UPS Grd-Comm	Terms	2% 10 Net 30
Entered	05/05/99	Shipped	Requested 05/05/99
PO		View Order Notes	

Line	Product	Description	Quantity			UOM	Price	Extended
			Order	Ship	B/O			
1	1-001 *	Tap Extension, Size 0-6 Red	2	0	2	each	10.00	20.00
Whole Order Discount								0.00
Subtotal								20.00
Taxes								0.40
Total								20.40

[Back To Order Listing](#) [New Inquiry](#)

Conn: 1000 Oper: sf2 Opertype: a Cust#: 1001 ShipTo: Default Order: nw34132 Whse: rem

Your quote has now been placed. Your sales representative will receive notification of the quote and then contact you.

Comments and Notes

Notes and comments are an excellent way to provide additional information about an order or line item. You have the option to attach notes to orders and/or attach comments to line items on your order. Notes and comments are similar in that they both provide electronic annotations that simulate the slips of paper you would normally attach to a paper order.

Notes

A note is a record attached to an entire order. There are order notes and products notes. Order notes can be viewed, modified, created, or deleted from the Current Order window. You can view notes the Order Details window by clicking View Order Notes.

A product note is indicated by an '*' or an exclamation point (!) next to a product number. The '!' means that the note is required; there is valuable information pertaining to the order or the product. You can only view product notes.

NOTE: From the inquiry windows, you will only be able to view notes, not change them.

Comments

A comment is attached to a specific line in an order and is noted in the order display section by a com next to the product line number. From the Current Order window, you can add, change or delete a line comment. Access the Order Line Comment window by clicking com.

Adding/deleting notes

Follow the steps below to add or delete notes on an order.

- 1 Click Current Order from the menu bar. The Current Order window displays.

Current Order - twi34132

You have items in your shopping basket.

Bill To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO 84512
Default - Hypo Drive Inc. [Update Ship To]

Ship To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO 84512

NOTE: Defaults are based on Ship To. Verify/Change Ship To BEFORE updating.

PO: []
Order Type: SO - Sales Order
Requested: 05/31/99
Reference: []
Ship Via: upsg - UPS Grd-Comm
Instructions: []
Disposition: N - Normal
Warehouse: rem - Remote Warehouse
Entered: 05/29/99

No Orders for Other Warehouses and Ship To

Apply Changes to Above Fields

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
1	com 1124885	1 1/2" Pvc Dwn P Trap Nibco	6	0	each	8.36	0.00 %	50.16
2	com 1124807	1 1/2" Pvc Dwn 90° Ell Hub x Hub Nibco	3	0	each	2.40	0.00 %	7.20
3	com 24807	2" Pvc Dwn 90° Ell Hub x Hub Nibco	25	0	each	3.03	0.00 %	75.75
4	com 34807	3" Pvc Dwn 90° Ell Hub x Hub Nibco	7	0	each	9.42	0.00 %	65.94
5	com 1124885	1 1/2" Pvc Dwn P Trap Nibco	7	0	each	8.36	0.00 %	58.52

Add Product to Order: [] Qty: [] Go

Total 257.57

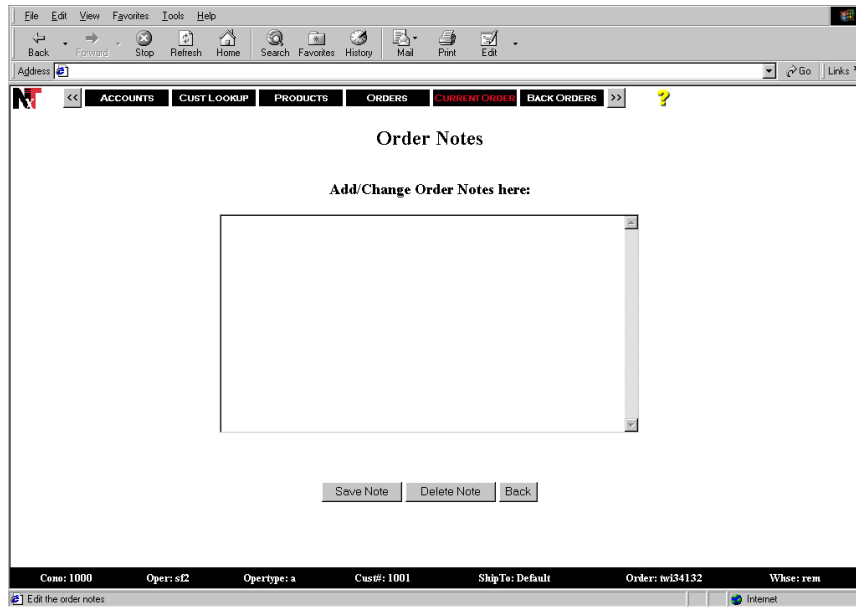
Delete Order Place Order

The Place Order button will put the items you have in this Current Order on order with JLC Company.

Cono: 1000 Oper: sf2 Opertype: a Cust#: 1001 Ship To: Default Order: twi34132 Whse: rem

Enter a product no. Internet

- 2 Click Add or Modify Order Notes to access the Order Notes window.



- 3 Enter your note or modify existing notes in the notes text box.
- 4 Click Save Note to save your note, or click Delete Note to delete the note. Otherwise, click Back to go to the Current Order window with no changes being made.

Adding/deleting comments

Follow the steps below to add or delete comments on a line.

- 1 Click Current Order from the menu bar. The Current Order window displays.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS CURRENT ORDER BACK ORDERS

Current Order - twi34132

You have items in your shopping basket.

Bill To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

Default - Hypo Drive Inc.

Update Ship To

Ship To: Hypo Drive Inc.
5541 Northern Main Street
Durango, CO
84512

No Orders for Other Warehouses and Ship To

NOTE: Defaults are based on Ship To.
Verify/Change Ship To BEFORE up-dating

PO

Order Type

Requested

Reference

Ship Via

Instructions

Disposition

Warehouse

Entered

Apply Changes to Above Fields

Add or Modify Order Notes

Line	Product	Description	Quantity	QTY Avail	UOM	Price	Discount	Extended
1 com	1124885	1 1/2" Pvc Dww P Trap Nbco	6	0	each	8.36	0.00 %	50.16
2 com	1124807	1 1/2" Pvc Dww 90' Ell Hub x Hub Nbco	3	0	each	2.40	0.00 %	7.20
3 com	24807	2" Pvc Dww 90' Ell Hub x Hub Nbco	25	0	each	3.03	0.00 %	75.75
4 com	34807	3" Pvc Dww 90' Ell Hub x Hub Nbco	7	0	each	9.42	0.00 %	65.94
5 com	1124885	1 1/2" Pvc Dww P Trap Nbco	7	0	each	8.36	0.00 %	58.52

Add Product to Order: Qty: Go

Total 257.57

Delete Order Place Order

This will put the items you have in your shopping basket on order with Industrial Supply Wholesalers

Cono: 1000 Oper: sf2 Opertype: a Cust#: 1001 ShipTo: Default Order: twi34132 Whse: rem

Enter a product no. Internet

- Click [com](#) in the Line column located in the Order Display section. The following window will display:

File Edit View Go Favorites Help

Back Forward Stop Refresh Home Search Favorites History Channels Fullscreen Mail Print Edit

Address

ACCOUNTS CUST LOOKUP PRODUCTS ORDERS CURRENT ORDER BACK ORDERS

Order Line Comment

Add/Change line comment here:

Save Comment Delete Comment Back

Cono: 1000 Oper: sf2 Opertype: a Cust#: 251 ShipTo: Default Order: Whse: carr

Internet zone

- 3** Enter comments or modify existing comments in the comment area.
- 4** Click Save Comment to save the comment, or click Delete Comment to delete the entire the comment. Otherwise, click Back to return to the Current Order window.

Performing Searches

The Product Inquiry window allows you to perform product searches using a combination of selections. The product inquiry will display information such as product availability, selling unit, and product number. Choose one of the three following methods:

- ◆ Performing keyword searches
- ◆ Performing product category searches
- ◆ Performing vendor searches

Performing keyword searches

You are not required to enter information in any of the Product Inquiry boxes, but the more information you enter, the more specific the search will be.

- 1 Click Products from the menu bar. The following Product Inquiry window displays.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address

ACCOUNTS CUST LOOKUP **PRODUCTS** ORDERS CURRENT ORDER BACK ORDERS

Product Inquiry

Search By Product number, description or keywords

Warehouse: main Keywords:

For keyword searches, please leave a blank between words.

Method: Keyword File: Stock Items - ICSP When ready, click GO

Method Key:

Keyword - The search will use **each** word of the product description.
Product - The search will use the **first** word of the product name.
Description - The search will use the **first** word of the product lookup name.

Search for Product Categories

Warehouse: main Product category description beginning with GO

Search for Vendors

Warehouse: main Product Vendor name beginning with GO

Cuno: 0067 Oper: wlad Opertype: a Cust#: 10 ShipTo: Default Order: twi32746 Whse: east

Enter any keywords (Optional)

Internet

- 2 In the Search By Product number, description or keywords area, enter a warehouse in the Whse box. Your default warehouse displays and depending on your security, you may not be able to change this box.
- 3 Enter a Keyword. Use this box in conjunction with the Method box. Enter one word for the Product or Description method. Enter five or less words for the Keyword method.
- 4 In the Method box, select Product, Description, or Keyword.
- 5 In the File box, select Stock Items, All Products, or Catalog Items.

- 6 Click GO from the Search By Product number, description or keywords area to perform the search.

Performing product category searches

Product Categories are used to group products. You can use the product category to search for specific groups of products. Each product category is set up in *SX.enterprise: Inventory Control Setup Products (ICSP)* and *Inventory Control Setup Categories (ICSC)*.

- 1 Click Products from the menu bar. The Product Inquiry window displays.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address Go Links

ACCOUNTS CURT LOOKUP **PRODUCTS** ORDERS CURRENT ORDER BACK ORDERS

Product Inquiry

Search By Product number, description or keywords

Warehouse: Keywords:

For keyword searches, please leave a blank between words.

Method: File: When ready, click

Method Key:

Keyword - The search will use **each** word of the product description.
Product - The search will use the **first** word of the product name.
Description - The search will use the **first** word of the product lookup name.

Search for Product Categories

Warehouse: Product category description beginning with

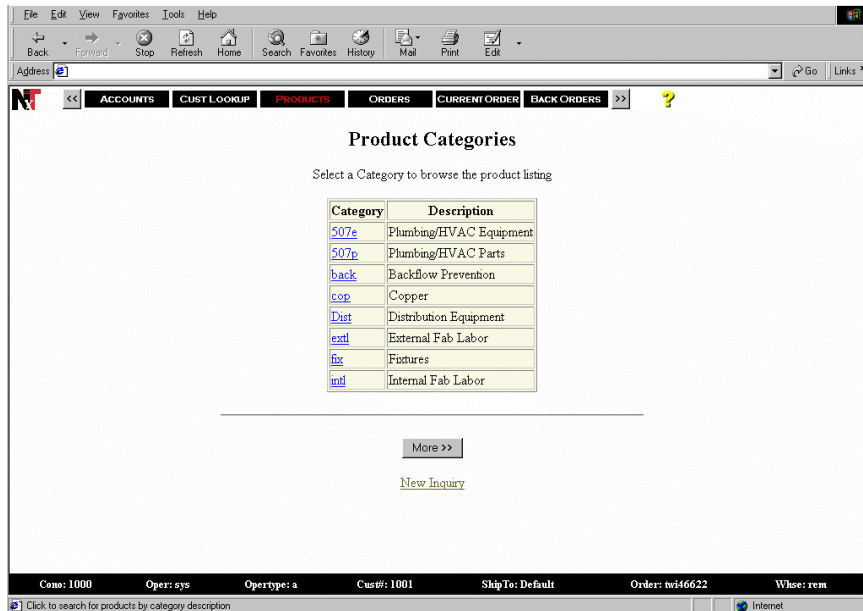
Search for Vendors

Warehouse: Product Vendor name beginning with

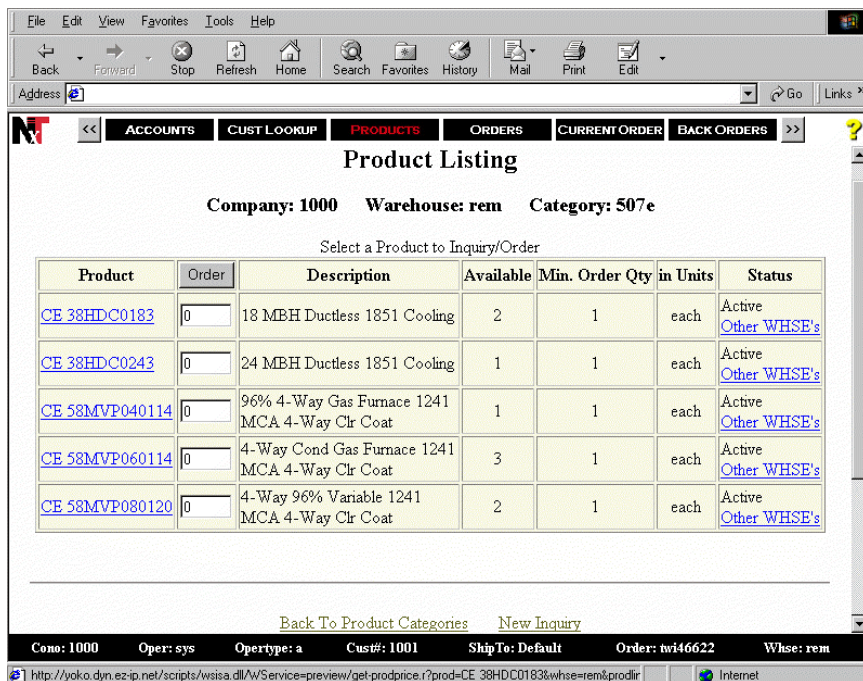
Conn: 0067 Opex: wlad Opertype: a Cust#: 10 Ship To: Default Order: tw32746 Where: east

Enter any keywords (Optional) Internet

- 2 In the Search for Product Categories area, enter or accept your default warehouse.
- 3 Enter a product category description or leave blank for a broad search.
- 4 Click GO in the Search for Product Categories area. The Product Categories window displays your search results.



- 5 Click a category to display a listing of all products in that category. The Product Listing window displays the product availability, minimum ordering quantities, and product status.



- 6 Click a product number to display more information about that product, such as available quantity and price.
- 7 If you want to add products from the list to your current order, enter the quantity of the product in the Order box and click Order. You can enter multiple quantities before clicking Order.

- 8 If applicable, click Other WHSE's in the Status column, for products available in other warehouses, or click Optional Products, Supersede Products, or Substitute Products in the Status column to display a list of these products and ordering capabilities.
- 9 Click Back To Product Categories to return to the Product Categories window, or click New Inquiry to return to the Product Inquiry window.

Performing vendor searches

When you perform a vendor product search you will be able to look up products that relate to that vendor.

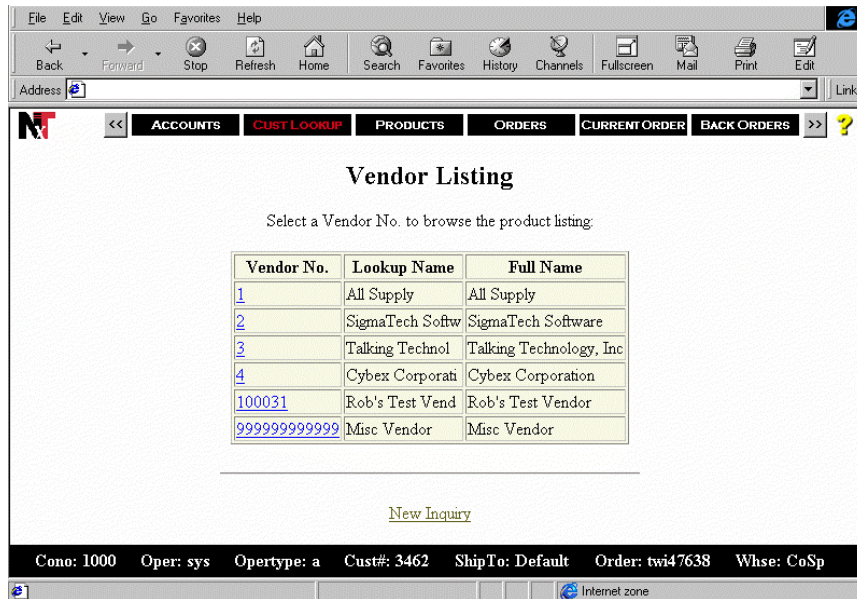
- 1 Click Products from the menu bar. The Product Inquiry window displays.

The screenshot shows a web browser window displaying the 'Product Inquiry' application. The browser's address bar shows the application's URL. The application's menu bar includes 'ACCOUNTS', 'CUST LOOKUP', 'PRODUCTS' (which is highlighted), 'ORDERS', 'CURRENT ORDER', and 'BACK ORDERS'. The main content area is titled 'Product Inquiry' and contains three search sections:

- Search By Product number, description or keywords:** This section includes a 'Warehouse' dropdown menu set to 'main', a 'Keywords' text input field, and a 'Method' dropdown menu set to 'Keyword'. Below this is a 'Method Key' section explaining the search methods: 'Keyword' (uses each word of the product description), 'Product' (uses the first word of the product name), and 'Description' (uses the first word of the product lookup name). There is also a 'GO' button.
- Search for Product Categories:** This section includes a 'Warehouse' dropdown menu set to 'main' and a 'Product category description beginning with' text input field. There is a 'GO' button.
- Search for Vendors:** This section includes a 'Warehouse' dropdown menu set to 'main' and a 'Product Vendor name beginning with' text input field. There is a 'GO' button.

The status bar at the bottom of the application window displays the following information: 'Cuno: 0067', 'Oper: wlad', 'Opertype: a', 'Cust#: 10', 'Ship To: Default', 'Order: tw32746', and 'Whse: east'. The browser's status bar at the very bottom shows 'Enter any keywords (Optional)' and 'Internet'.

- 2 In the Search for Vendors area, enter or accept your default warehouse.
- 3 Enter a vendor name, partial name or leave this box blank. The more detailed the information you enter, the more specific the results will be.
- 4 Click GO from the Search for Vendors area. The Vendor Listing window displays with your search results.



- 5 Click a vendor number to display the Product Listing window, or click New Inquiry to return to the Product Inquiry window.

Inquiring on an order

Display information about an order by following the steps below. Enter a minimal amount of information to perform a general search. There are two different searches you can perform from this window: by order number or by search criteria.

- 1 Click Orders from the menu bar. The Order Inquiry window displays.

Look up By Order#

Please choose any or all search criteria and click 'Go'

Whse: Ship To: When ready, click

Order Type: Trans Type: Stage:

For orders entered between: / / and / / Please use (mm/dd/yy) format

Your PO Number: Contains Product Number:

- 2 Enter the order number and suffix. If you do not know the order number, go to step 4.
- 3 Click GO to perform the search.

- 4 Enter a warehouse in the Whse box. Your default warehouse displays and depending on your security, you may not be able to change this box.
- 5 Select an Order Type: either placed order or current order. A placed order is an order that has already been sent to your vendor. A current order is an order that has not been placed and displays in the Current Order window.
- 6 Select a transaction type or accept the default of All Types.
- 7 Select a Stage: Any Stage, Entered, Ordered, Picked, Shipped, Invoiced, or Paid.
- 8 Enter a date range (MM/DD/YY) or accept the default of January 1 of the current year through today. This will narrow the search for those orders placed within the date range.
- 9 Enter a purchase order number in the Your PO Number box. The search will be restricted to those orders that contain the specified purchase order.
- 10 Enter a product number in the Contains Product Number box. The search will be restricted to those orders that contain the specified product number.
- 11 Click GO to start the search. The Order Listing window displays with your search results.

NOTE: From the Order Listing window you can drill-down into the Order Details window.

Inquiring on a back order

Display a list of back orders by following the steps below.

- 1 Click Back Orders from the menu bar. The Back Order Listing window displays.

Product	Description	Quantity	Unit	Original Order No.	Original Order Date	Expected Due Date
1124885	1 1/2" Pvc Dwv P Trap Nibco	6.00	each	2000175-00		05/29/99
1124807	1 1/2" Pvc Dwv 90° Ell Hub x Hub Nibco	3.00	each	2000175-00		05/29/99
24807	2" Pvc Dwv 90° Ell Hub x Hub Nibco	25.00	each	2000175-00		05/30/99
34807	3" Pvc Dwv 90° Ell Hub x Hub Nibco	7.00	each	2000175-00		05/30/99
1124885	1 1/2" Pvc Dwv P Trap Nibco	7.00	each	2000175-00		05/29/99

More >>

Cono: 1000 Oper: s12 Opertype: a Cust#: 1001 ShipTo: Default Order: nvi43275 Whse: rem

Enter a product no. Internet

- 2** Click on a product number to display the Item/Order Inquiry Worksheet. If notes are attached to this product, an asterisk (*), or an exclamation point (!) will display next to the product number. Click the '*' or '!' to display the notes.
- 3** Click Original Order No. to display the Order Details window.