



# Sales & Order Entry



# Different Types of Order Entry

## Counter Sales Order (customer pick up)

- Walk in - One time customer
  - Cash
- Walk in - Repeat customer
  - Paid in Advance: Cash/Check/Credit Card

## Counter Sales Order (to be delivered)

- Walk in - One time customer
  - Paid in Advance: Cash/Check/Credit Card
  - COD
- Walk in - Repeat customer
  - On Account
  - COD
  - Paid in Advance: Check/Cash/Credit Card

## Regular Sales Order

- TO BE DELIVERED
  - On Account
  - Paid in Advance: Check/Cash
  - Paid in Advance: Credit Card
  - COD

## Regular Sales Order

- CUSTOMER PICK-UP
  - On Account
  - Paid in Advance: Cash/Check
  - Paid in Advance: Credit Card

## Emergency Back Orders

## Direct Ship

## Sales Quote – Standard



# Counter Sales

Login Page - Microsoft Internet Explorer

File View Favorites Tools Help

Address

Welcome John C. Smith!  
Tuesday, November 24, 2009 02:28PM  
[Log Out](#)

**Sales Module Menu**

**Sales**

- Setup
- Pricing
- Counter**
  - Counter Sales
  - Cash Receipt
  - Verify Picking
  - Dispatch
  - Bank Deposit
  - Cashier Transaction
- Order Management
- Sales Return
- Reports
- Product Tools
- SPA

**Counter Submenu**

**Counter Sales Submenu Option**

**Help Links**

- FAQ
- Technical Support

**Documentation**

- Navigation and Basic Tasks
- Administration
- Systems Parameters
- Accounts Receivable
- General Ledger
- Banking & Bank Reconciliation
- 07- Accounts Payable
- 08- Project Administration
- 09- Product Catalog
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- 11- Purchasing
- 12- Sales and Order Entry
- 13- Billing
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ERP GL Account Codes  
ERP System Master Codes

IBM Business Partner

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javascript:window.open('/Ximple/wd/CashSales.do','\_blank','top=80,left=80,width=800,status=yes,height=500,scrollbars=yes,res')

Local intranet



# Counter Sales - Steps

## **Will Call & Pay in Advance**

(Mixed Counter)

1. Enter & Book Order
2. Enter Cash Receipt
3. Verify Picking
4. Dispatch

## **Will Call & On Account**

(Mixed Counter)

1. Enter & Book Order
2. Verify Picking
3. Dispatch

## **Shipping & Pay in Advance**

(Mixed Counter)

1. Enter & Book Order
2. Enter Cash Receipt

## **Shipping & On Account**

(Mixed Counter)

1. Enter & Book Order

## **All Independent**

- Enter & Book Order
- Enter Cash Receipt
- Verify Picking
- Dispatch



# Counter Will Call - Steps

## Customer is at the Counter

### Will Call & Pay in Advance

(Mixed Counter)

1. Enter & Book Order
2. Enter Cash Receipt
3. Verify Picking
4. Dispatch

### Will Call & On Account

(Mixed Counter)

1. Enter & Book Order
2. Verify Picking
3. Dispatch

## Order is Phoned in

### Will Call & Pay in Advance

1. Enter & Book Order
2. Verify Picking & Stage Material

### When customer arrives

3. Enter Cash Receipt
4. Dispatch

### Will Call & On Account


1. Enter & Book Order
2. Verify Picking & Stage Material

### When customer arrives

3. Dispatch



# Counter Sales (Regular Customer)



Ximple Solutions 2

**New Counter Order - Customer & Store**

11/01/2012

09:45:46


User Guide

| New Counter Order    |  |
|----------------------|--|
| Sales Person         | User Guide ▼   |
| Order Date           | 11/01/2012   |
| *Customer            | <input type="text" value="Custar Electric"/> <input type="button" value="V"/> <input type="checkbox"/> One Time Customer <input type="button" value="Add Customer"/> |
| *Store               | MCK ▼  |
| *Billing Currency    | US Dollar ▼  |
| *Exchange Rate Final | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Discount %           | <input type="text"/>   |
| Require Shipping     | <input type="checkbox"/>   |

**Continue** to  
Next Page




# Counter Sales (Order Entry)




**Ximple Solutions 2**  
**Counter Order**

11/01/2012  
09:46:18  
User Guide


| Shipping & Billing |            |       |  |              |
|--------------------|------------|-------|--|--------------|
| Order #            | Order Date | Store | Customer   | Sales Person |
|                    | 11/01/2012 | MCK   | Custar Electric [AC]  | User Guide   |

Cust PO / Rel. #  /


Cust PO Date  

Job Name

Mark Carton

Order Placed By  

Contract

\*Need By  

\*Tax Exempt ☒ Yes ☐ No

Exemption Reason

\*Billing Currency

\*Exchange Rate Final ☒ Yes ☐ No

Discount %

No Early Pay Disc ☐

Payment Method

\*Shipping Method



Payment Term



S & H


Priority

Price Packing Slip ☒

Shipping Strategy


Bill To   /  

Ship To   /  

Email Notification  

Must Charge S & H ☐ One Time Charge ☐

Blind Ship ☐

Shipping From  

Shipping Instructions

197characters remaining on your input limit

Internal Comments

255characters remaining on your input limit

Click  
**Save & Continue**


Save & Continue >>

Reset

Cancel



# Counter Sales (Order Entry)



**Ximple Solutions 2**  
**Counter Order - Items**

11/01/2012  
09:48:33  
User Guide

---

Sales Order # 1883

|            |            |                  |                                 |                |        |
|------------|------------|------------------|---------------------------------|----------------|--------|
| Store      | MCK        | Customer         | Custar Electric [AC] (88558.36) | Total Line     | 0.00   |
| Sales Rep. | User Guide | Cust PO / Rel. # | 1235 / 1                        | Total Discount | - 0.00 |
| Order Date | 11/01/2012 | Need By          | 11/01/2012                      | Total Tax      | 0.00   |
| Pay Method | Cash / COD | Discount %       | 0.00 Min for Free Frt 50.00     | S & H          | 0.00   |
| Pay Term   |            | Status           | WIP                             | Total          | 0.00   |

---

| Line#              | Item<br>Cust Prod # | Order<br>Qty | Cmt.<br>Qty | BO<br>Qty | Trnf.<br>Qty | Shp.<br>Qty | Canc<br>Qty | Price | Cust<br>Price | Disc % | Allow<br>BO | EBO | SPJ | Cost*SPA | GM % | Total | View | Info | Asso<br>Prod | Lot<br>Prc |
|--------------------|---------------------|--------------|-------------|-----------|--------------|-------------|-------------|-------|---------------|--------|-------------|-----|-----|----------|------|-------|------|------|--------------|------------|
| No data was found. |                     |              |             |           |              |             |             |       |               |        |             |     |     |          |      |       |      |      |              |            |

☐ Error Only
 ☐ Hide Cost
 ☐ Cust Prt#

Line#:

---

Line Detail ( Line# )

| Item                    | Avb<br>Qty | Order Qty | Force<br>BO Qty | Price | Cust.<br>Price | GM%<br>Disc% | Need By    | Allow<br>BO | EBO |
|-------------------------|------------|-----------|-----------------|-------|----------------|--------------|------------|-------------|-----|
| AE AE10001 AE Short Des | EA         | Info      | 120             | 1     | 80.00          | EA           | 11/01/2012 |             |     |

Vendor    
 Pur. Price

Vend Item #   
 Vend Quote #

Mfr Catalog #

|                  |                 |                 |                |            |           |              |  |                       |
|------------------|-----------------|-----------------|----------------|------------|-----------|--------------|--|-----------------------|
| Cust Rtnble      | N               | Sell Min Qty 1  | SPA Cost       | 65.00      | GM %      | 10.00        | Min Sales Price 80.00                                      | Purch Min/Iner Qty    |
| Vend Rtnble      | N               | Sell Incr Qty 1 | Force SPJ      |            | Sys. GM % | 10.00        | Price Break  | Vend Prc Date 09/11/2 |
| Inventory Item Y |                 | Stock Item Y    | Active         | Y          | Obsolete  | N            | Packaging  | Customer Line #       |
| Vendor           | Arctic Electric |                 | Next Pur. Date | 11/02/2012 |           | Freight Term | Vendor pays if total amount exceeds min. freight set 20.00 |                       |

Customer Comments   
 128characters remaining on your input limit

Comments   
 255characters remaining on your input limit

Warehouse Instruction   
 128characters remaining on your input limit

Vendor Comments   
 128characters remaining on your input limit

Internal Comments   
 128characters remaining on your input limit

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Click to  
Search  
for  
Product

Add  
Item to  
Order



# Counter Sales (Order Entry)

Select Product to Move  
Down to Line Detail  
Portion of Form

Ximple Solutions 2  
**Counter Order - Items**

11/01/2012  
10:35:08  
User Guide

---

Sales Order # 1883

|            |            |                  |                                 |                |        |
|------------|------------|------------------|---------------------------------|----------------|--------|
| Order Date | 11/01/2012 | Customer         | Custar Electric [AC] (88556.36) | Total Line     | 80.00  |
| Pay Method | Cash / COD | Cust PO / Rel. # | 1235 / 1                        | Total Discount | - 0.00 |
| Pay Term   |            | Need By          | 11/01/2012                      | Total Tax      | 0.00   |
|            |            | Discount %       | 0.00 Min for Free Frt 50.00     | S & H          | 0.00   |
|            |            | Status           | WIP                             | Total          | 80.00  |

---

| Line# | Item                            | Cust Prod # | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc Qty | Price    | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost*/SPA  | GM %  | Total | View | Info | Asso Prod | Lot Proc |
|-------|---------------------------------|-------------|-----------|----------|--------|-----------|----------|----------|----------|------------|--------|----------|-----|-----|------------|-------|-------|------|------|-----------|----------|
| 1     | AE AE10001 AE Short Description |             | 1 EA      | 1        | 0      | 0         | 0        | 0        | 80.00 EA |            | 0.00   | Yes      |     |     | 72.0000 EA | 10.00 | 80.00 | View | Info |           |          |

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☐ Error Only
 ☐ Hide Cost
 ☐ Cust Prt#
 [Delete Line](#)
[Lost Sale](#)
[New Prod](#)
[Cust Prt#](#)
[Upload](#)

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Line Detail ( Line# )

|                      |                      |                      |                      |                      |                      |                      |            |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------|
| Item                 | Avb Qty              | Order Qty            | Force BO Qty         | Price                | Cust. Price          | GM% Disc%            | Need By    |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 11/01/2012 |

Vendor  Vend Item #  Mfr Catalog #

Price  Vend Quote #

|                |                |              |           |                 |                    |
|----------------|----------------|--------------|-----------|-----------------|--------------------|
| Rtnble         | Sell Min Qty   | SPA Cost     | GM %      | Min Sales Price | Purch Min/Incr Qty |
| Rtnble         | Sell Incr Qty  | Force SPJ    | Sys. GM % | Price Break     | Vend Prc Date      |
| Inventory Item | Stock Item     | Active       | Obsolete  | Packaging       | Customer Line #    |
| Vendor         | Next Pur. Date | Freight Term |           |                 |                    |

---

Customer Comments

Comments

Vendor Comments

Warehouse Instruction

Internal Comments

[Save New Line](#)

---

[<< Back](#)
[Book](#)
[Exit](#)
[Locate Stock](#)

Tip: Link  
to Product  
Navigator

Click '**Book**' or  
'**Exit**' to Finish



# Counter Sales (Book Order)



Ximple Solutions 2  
**Counter Order List**

11/01/2012

10:37:04

User Guide

| Order # | Type | Order Date | Store / Warehouse | Customer        | Cust PO | Sales Rep. | Status | On Hold | PO |
|---------|------|------------|-------------------|-----------------|---------|------------|--------|---------|----|
| 1883    |      | 11/01/2012 | MCK               | Custar Electric | 1235/1  | User Guide | WIP    |         |    |

View  
Edit  
**Book**  
Copy  
Print  
Delete  
Multimedia

Back To Lookup

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Ximple Solutions 2  
**Counter Order Book**

11/01/2012

10:39:51

User Guide

Sales Order # 1883

|            |            |                  |                             |                |        |
|------------|------------|------------------|-----------------------------|----------------|--------|
| Store      | MCK        | Customer         | Custar Electric [AC] (0.00) | Total Line     | 80.00  |
| Sales Rep. | User Guide | Cust PO / Rel. # | 1235 / 1                    | Total Discount | - 0.00 |
| Order Date | 11/01/2012 | Need By          | 11/01/2012                  | Total Tax      | 0.00   |
| Pay Method | Cash / COD | Discount %       | 0.00                        | S & H          | 0.00   |
| Pay Term   |            | Status           | WIP                         | Total          | 80.00  |

S & H 0.00

Must Charge S & H ☐

One Time Charge ☐

Book

Cancel

Select  
**Book**

Click  
**Book**

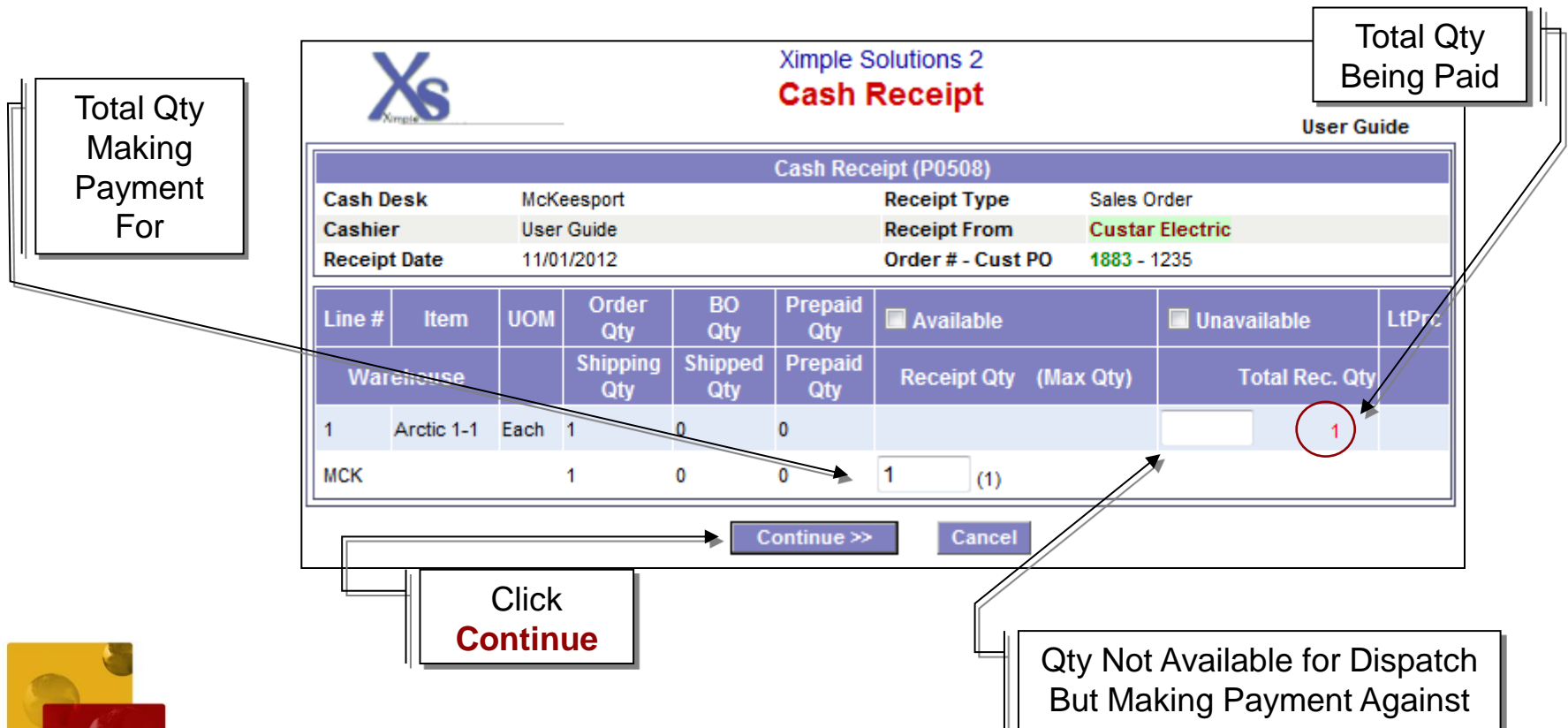
1. If the order is being “**Shipped**” to the customer then ‘**Booking**’ the order concludes the Order Entry process.
  - However, IF the payment method is ‘Cash’ (not COD) then you **MUST** enter a Cash Receipt for the order.
2. If the order “**WC**” and:
  - Payment method is ‘On Account’ then the next step is to Pick Verify.
  - Payment method is Cash (not COD) then the next step is to enter a Cash Receipt for the order.



# Counter Sales (Cash Receipt)

## Notes:

- If payment method is **On Account**, then this section is skipped and the Picking Items page is displayed instead.
- If order is for a One Time Customer, this page is skipped and the Payment Detail page is displayed instead (next slide).



**Total Qty Making Payment For**

**Total Qty Being Paid**

**Click Continue**

**Qty Not Available for Dispatch But Making Payment Against**

**Ximple Solutions 2 Cash Receipt**

**Cash Receipt (P0508)**


|                     |            |                          |                 |
|---------------------|------------|--------------------------|-----------------|
| <b>Cash Desk</b>    | McKeesport | <b>Receipt Type</b>      | Sales Order     |
| <b>Cashier</b>      | User Guide | <b>Receipt From</b>      | Custar Electric |
| <b>Receipt Date</b> | 11/01/2012 | <b>Order # - Cust PO</b> | 1883 - 1235     |

| Line #    | Item       | UOM  | Order Qty    | BO Qty      | Prepaid Qty | <input type="checkbox"/> Available | <input type="checkbox"/> Unavailable | LtPr |
|-----------|------------|------|--------------|-------------|-------------|------------------------------------|--------------------------------------|------|
| Warehouse |            |      | Shipping Qty | Shipped Qty | Prepaid Qty | Receipt Qty (Max Qty)              | Total Rec. Qty                       |      |
| 1         | Arctic 1-1 | Each | 1            | 0           | 0           |                                    |                                      | 1    |
| MCK       |            |      | 1            | 0           | 0           | 1 (1)                              |                                      |      |

**Continue >>** **Cancel**



# Counter Sales (Cash Receipt)



Ximple Solutions 2

**Cash Receipt**

11/01/2012

10:57:19

User Guide

**Cash Receipt (P0508)**

|              |            |                   |                 |
|--------------|------------|-------------------|-----------------|
| Cash Desk    | McKeesport | Receipt Type      | Sales Order     |
| Cashier      | User Guide | Receipt From      | Custar Electric |
| Receipt Date | 11/01/2012 | Order # - Cust PO | 1883 - 1235     |

Amount To Pay 80.00 US Dollar

Credit Available 2,147.23 US Dollar

Tender

Comments

| Payment Detail                           |                      |           |  |
|--|----------------------|-----------|--|
| Method                                   | Amount               | Currency  | Additional Info  |
| <input checked="" type="checkbox"/> Cash | 80.00                | US Dollar | <a href="#">Calculate</a>  |
| <input type="checkbox"/> Check           | <input type="text"/> | US Dollar | Check Number <input type="text"/><br>Bank <input type="text"/>   |
| <input type="checkbox"/> Credit Card     | <input type="text"/> | US Dollar | Credit Card # <input type="text"/><br>Expiration (MM/YYYY) <input type="text"/> <input type="text"/><br>Card Holder Name <input type="text"/> Security Code <input type="text"/><br>Address <input type="text"/><br>Zip Code <input type="text"/> <div style="float: right;"> <a href="#">Swipe Card</a> <a href="#">Clear Card</a> </div> |

[<< Back](#) [Save](#) [Cancel](#)

Click to  
Calculate  
Payment


Click **Save**



# Counter Sales (Cash Receipt)

-- Webpage Dialog

No current selection



**Ximple Solutions**  
3829 Farragut Avenue  
Kensington, MD 20895  
Phone(412)678-8826

## Cash Receipt


Page 1

|                 |               |            |               |
|-----------------|---------------|------------|---------------|
| Receipt #       | Receipt Date  | Cash Desk  | Sales Order # |
| 840             | 11/01/2012    | McKeesport | 1883          |
| Warehouse/Store | Phone #       | Cashier    | Currency      |
| MCK             | (412)678-8826 | User Guide | US Dollar     |
| Cust Acct #     | Customer PO   | Job Name   |               |
| 10005           | 1235          | Job Name   |               |

Received From: Custar Electric  
10002 Custar Drive  
Rockville, MD 20850

Ship To:

Receipt #



00002\_840

| LINE # | UPC         | MFG-CATALOG<br>ITEM DESCRIPTION<br>CUSTOMER PART NUMBER               | ORD QTY | RECEIPT<br>QTY | BO'D QTY | PREV SHP<br>QTY | UOM | UNIT PRICE | DISC % | AMOUNT |
|--------|-------------|---|---------|----------------|----------|-----------------|-----|------------|--------|--------|
| 1      | 10001010001 | AE10001 - Arctic Electric<br>AE Short Description<br>(NOT RETURNABLE) | 1       | 1              | 0        | 0               | EA  | 80.00 EA   |        | 80.00  |

Payment: Cash 80.00 US Dollar

Subtotal 80.00  
Shipping & Handling 0.00  
Total 80.00 US Dollar  
Amount Paid 80.00 US Dollar

Receiver Signature: \_\_\_\_\_


Conditions Of Sale  
THANK YOU FOR YOUR BUSINESS! Cut wire is not returnable. See our website [www.sunrayelectric.com](http://www.sunrayelectric.com) for complete terms. 1.19

General  
data of  
receipt

Line  
Item  
Info &  
totals



# Counter Sales (Verify Picking)



Ximple Solutions 2

**Picking - Items**

11/01/2012

10:58:22

User Guide

| Picking Info (P05240) |                    |               |             |            |  |  |  |  |  |
|-----------------------|--------------------|---------------|-------------|------------|--|--|--|--|--|
| Warehouse             | MCK                | Status        | Not Started | Packed By  |  |  |  |  |  |
| Ticket # - Date       | 1594 - 11/01/2012  | Verified Date |             | Checked By |  |  |  |  |  |
| Doc. Type - Doc. #    | Sales Order - 1883 | Item          |             |            |  |  |  |  |  |
| Customer              | Custar Electric    | UPC           |             |            |  |  |  |  |  |
| Cust PO               | 1235               | Qty to Pick   |             |            |  |  |  |  |  |
| Fulfillment Rule      | Ship Available     | Qty Picked    |             |            |  |  |  |  |  |

| Line # | UPC         | Item                            | Qty to Pick | Dmg Qty | Dfc Qty | Picked Qty | BO Qty | Cancelled Qty | UOM |
|--------|-------------|---------------------------------|-------------|---------|---------|------------|--------|---------------|-----|
| 1      | 10001010001 | AE AE10001 AE Short Description | 1           | 0       | 0       | 0          | 0      | 0             | EA  |

All Zones ▼

☒ Pending Only

Quick Verify

Position To Line #:

Go

<< Back


Dispatch >>

Cancel

**Select**  
Item to  
Pick



# Counter Sales (Verify Picking)



Ximple Solutions 2

**Picking - Item Location & Qty**

11/01/2012

11:00:37

User Guide

| Picking Info (P05240) |                    |               |                                    |  |            |  |
|-----------------------|--------------------|---------------|------------------------------------|--|------------|--|
| Warehouse             | MCK                | Status        | Not Started                        |  | Packed By  |  |
| Ticket # - Date       | 1594 - 11/01/2012  | Verified Date |                                    |  | Checked By |  |
| Doc. Type - Doc. #    | Sales Order - 1883 | Item          | AE AE10001 AE Short Description EA |  |            |  |
| Customer              | Custar Electric    | UPC           | 10001010001                        |  |            |  |
| Cust PO               | 1235               | Qty to Pick   | Good - Dmg - Dfc = 1 - 0 - 0       |  |            |  |
| Fulfillment Rule      | Ship Available     | Qty Picked    | Good - Dmg - Dfc = 0 - 0 - 0       |  |            |  |

| Location | LPN # | Qty at Loc. | Suggest Qty |     |     | Picked Qty                     |                                |                                |
|----------|-------|-------------|-------------|-----|-----|--------------------------------|--------------------------------|--------------------------------|
|          |       |             | Good        | Dmg | Dfc | Good                           | Dmg                            | Dfc                            |
| D01      | 18    | 1           | 0           | 0   | 0   | <input type="text" value="1"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |
| D02      | 4     | 0           | 0           | 0   | 0   | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |
| D07      | 110   | 0           | 0           | 0   | 0   | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |

BO Qty

☒ Final


<< Back
Save
Exit

Click **Save**

Finish Picking



# Counter Sales (Verify Picking)



Ximple Solutions 2


**Picking - Items**

11/01/2012

11:01:11

User Guide

| Picking Info (P05240) |                    |               |            |            |  |  |  |  |  |
|-----------------------|--------------------|---------------|------------|------------|--|--|--|--|--|
| Warehouse             | MCK                | Status        | Total      | Packed By  |  |  |  |  |  |
| Ticket # - Date       | 1594 - 11/01/2012  | Verified Date | 11/01/2012 | Checked By |  |  |  |  |  |
| Doc. Type - Doc. #    | Sales Order - 1883 | Item          |            |            |  |  |  |  |  |
| Customer              | Custar Electric    | UPC           |            |            |  |  |  |  |  |
| Cust PO               | 1235               | Qty to Pick   |            |            |  |  |  |  |  |
| Fulfillment Rule      | Ship Available     | Qty Picked    |            |            |  |  |  |  |  |

| Line #  | UPC | Item | Qty to Pick | Dmg Qty | Dfc Qty | Picked Qty | BO Qty | Cancelled Qty | UOM |
|---|-----|------|-------------|---------|---------|------------|--------|---------------|-----|
|  No Data was found |     |      |             |         |         |            |        |               |     |

All Zones ▾

☒ Pending Only

Position To Line #:

Go

<< Back

Dispatch >>

Cancel

Continue to  
**Dispatch**

Any Item that remains MUST be  
verified individually (**Click** on Item)



# Counter Sales (Dispatch)



Ximple Solutions 2

**Dispatch Shipment**

11/01/2012

11:01:39

User Guide

| Order Info (P1304) |            |            |                 |                   |                |  |  |
|--------------------|------------|------------|-----------------|-------------------|----------------|--|--|
| Order #            | 1883       | Customer   | Custar Electric | Payment Method    | Cash / COD     |  |  |
| Order Type         | Cash Order | Cust PO    | 1235            | S & H             | 0.00           |  |  |
| Order Date         | 11/01/2012 | Job Name   | Job Name        | Charge S & H Once |                |  |  |
| Store              | MCK        | Sales Rep. | User Guide      | Status            | In Fulfillment |  |  |

| Item                            | Uom | Shipment Qty | Shipped Qty | Prepaid Qty | Picked Qty | Dispatch Avb. Qty | <input type="checkbox"/> Dispatch Qty               |
|---------------------------------|-----|--------------|-------------|-------------|------------|-------------------|---|
| AE AE10001 AE Short Description | EA  | 1            | 0           | 1           | 1          | 1                 | <input style="width: 50px;" type="text" value="1"/> |


Charge S & H:

Click **Submit**  
to Dispatch

Enter Qty to  
Dispatch



# Counter Sales (Dispatch)



**Ximple Solutions**  
 3829 Farragut Avenue  
 Kensington, MD 20895  
 Phone (412)678-8826

## Invoice

Page 1

|                 |               |            |               |
|-----------------|---------------|------------|---------------|
| Cash Invoice #  | Invoice Date  | Due Date   | Order #       |
| 565999-1        | 11/01/2012    | 11/01/2012 | 1883          |
| Warehouse       | Phone #       | By         | Date Shipped  |
| MCK             | (412)678-8826 | User Guide | 11/01/2012    |
| Customer Acct # | Customer PO   | PO Release | Shipping Type |
| 10005           | 1235          | 1          | Will Call     |
| Customer        | Job Name      |            |               |
| Custar Electric | Job Name      |            |               |

**Bill-To**

Custar Electric  
 Jamie Smith  
 2635 Custar Drive  
 Rockville, MD 20852

**Ship-To**

Custar Electric

| Line # | Item #      | Mfg-Catalog<br>Item Description<br>Customer Part Number               | STK<br>NSK | BO<br>Qty | Ord<br>Qty | Inv<br>Qty | UM | Unit Price | Disc<br>% | Ext Amount |
|--------|-------------|---|------------|-----------|------------|------------|----|------------|-----------|------------|
| 1      | 10001010001 | AE10001 - Arctic Electric<br>AE Short Description<br>(NOT RETURNABLE) | STK        |           | 1          | 1          | EA | 80.00 /EA  |           | 80.00      |

Payment:

Cash 80.00 US Dollar

Sub Total 80.00

Shipping & Handling 0.00

**CASH INVOICE AMOUNT 80.00 US Dollar**

Conditions Of Sale  
 TERMS & CONDITIONS OF SALE: Acceptance of the goods delivered pursuant to this order and invoice constitutes an acceptance of the following terms.  
 Customer agrees that in the event legal action is necessary to effect collection of the balance, customer will pay all costs of suit, including attorney fees. ROI 1.18.5

Federal Tax ID#

Info of the sales ticket



# Counter Sales Lookup

New  
Counter  
Order Form



Ximple Solutions  
**New Counter Order - Customer & Store**

12/02/2009  
18:06:54  
Jane Doe

New Counter Order

Sales Person
Jane Doe

Order Date
12/02/2009

\*Customer

One Time Customer
☐

\*Store

\*Billing Currency
US Dollar

\*Exchange Rate Final
☒ Yes
☐ No

Discount %


Require Shipping
☐

Click  
**Lookup**



# Counter Sales Lookup

Enter  
Lookup  
Parameters



Ximple Solutions 2

**Counter Order Lookup**

11/01/2012  
09:40:13  
User Guide

| Counter Order Lookup |  |  |   |
|----------------------|--|--|---|
| Sales Order #        | <input type="text"/>   | OR   | Customer P.O. <input type="text"/>        |
|                      |  | /  | OR Invoice # <input type="text"/>         |
|                      | OR   |  |   |
| Customer             | <input type="text"/>   | <input type="button" value="V"/>   | <input type="checkbox"/> Related Customer |
| Customer Type        | <input checked="" type="radio"/> All Customer <input type="radio"/> Regular Customer <input type="radio"/> One Time Customer |  |   |
| Customer Job Name    | <input type="text"/>   |  |   |
| Date Range           | <input type="text" value="11/01/2012"/> <input type="button" value="📅"/>   | <input type="text" value="11/01/2012"/> <input type="button" value="📅"/> |   |
| Sales Rep.           | <input type="text" value="User Guide"/>  |  |   |
| Store                | <input type="text" value="All"/>   |  |   |
| Sales Order Status   | <input type="text" value="All"/>   |  |   |
| Sales Order On Hold  | <input type="checkbox"/>   |  |   |
| Product              | <input type="text"/>   | <input type="button" value="V"/>   |   |
| Vendor               | <input type="text"/>   | <input type="button" value="V"/>   |   |

Add Counter Order

Click  
**Lookup**



# Counter Sales



**Xs** Ximple Solutions 2 11/01/2012 09:40:19  
**Counter Order List** User Guide

| Order # | Type | Order Date | Store / Warehouse | Customer  | Cust PO | Sales Rep. | Status | On Hold | PO |
|---------|------|------------|-------------------|-----------|---------|------------|--------|---------|----|
| 1882    | Add  | 11/01/2012 | MCK               | *Jane Doe |         | User Guide | Closed |         |    |

View  
Copy  
Print  
Refund  
Multimedia

Back To Lookup

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Popup Menu

Status of SO

## Popup Menu:

**View:** View SO information

**Edit:** Edit SO

**Book:** Book SO

**Copy:** Create a copy of the SO

**Print:** Print SO info (generates pdf file of SO)

**Delete:** Delete SO that's yet to be booked

**Cancel:** Cancel SO that's been booked

**Refund:** Refund customer

**Hold:** Place order on hold

**Release:** Release order that has been placed on hold

**Invoice Service:** Invoice a service type item in Booked SO




# Cancel Sales Order

## There are 3 ways to Cancel SO:

- **Entire Order:** Select Cancel option from order's popup menu.
- **Line Item:** Edit the order and go to the Counter Order—Items page, select the items to cancel and click Cancel.
- **By Stock:** Edit the order and go to the Counter Order-Items page, click the Cancel link of the item you want to cancel. Complete the Cancel Order Item form and click Submit.



# Cancel Order (Entire Order)



## Ximple Solutions 2 Counter Order List

11/01/2012  
11:15:17  
User Guide


| Order # | Type | Order Date | Store / Warehouse | Customer        | Cust PO | Sales Rep. | Status         | On Hold | PO |
|---------|------|------------|-------------------|-----------------|---------|------------|----------------|---------|----|
| 1884    |      | 11/01/2012 | MCK               | Johans Electric |         | User Guide | In Fulfillment |         |    |

- View
- Edit
- Add
- Hold
- Invoice Service
- Cancel
- Copy
- Print
- Multimedia

Back To Lookup

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Select  
Cancel



## Ximple Solutions 2 Cancel Sales Order

11/01/2012  
11:19:13  
User Guide

### Sales Order # 1884

|            |            |                  |                      |                |        |
|------------|------------|------------------|----------------------|----------------|--------|
| Store      | MCK        | Customer         | Johans Electric [CE] | Total Line     | 289.23 |
| Sales Rep. | User Guide | Cust PO / Rel. # | /                    | Total Discount | - 0.00 |
| Order Date | 11/01/2012 | Need By          | 11/01/2012           | Total Tax      | 20.24  |
| Pay Method | Cash / COD | Discount %       | 0.00                 | S & H          | 0.00   |
| Pay Term   |            | Status           | In Fulfillment       | Total          | 309.47 |

\*Cancel Reason Sales Error

Comments

Ordered wrong item

237 characters remaining on your input limit

Submit

Reset

Cancel

Click Submit



# Cancel Order (Line Item)

Select  
Edit



Ximple Solutions 2  
Counter Order List

11/01/2012

11:15:17

User Guide

| Order # | Type | Order Date | Store / Warehouse | Customer | Cust PO | Sales Rep. | Status | On Hold | PO |
|---------|------|------------|-------------------|----------|---------|------------|--------|---------|----|
|---------|------|------------|-------------------|----------|---------|------------|--------|---------|----|

1884

View  
Edit  
Hold  
Invoice Service  
Cancel  
Copy  
Print  
Multimedia

11/01/2012

MCK

Job

Back To Lookup

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Site design b



Ximple Solutions 2  
Counter Order

11/01/2012

11:20:17

User Guide

## Shipping & Billing

| Order # | Order Date | Store | Customer             | Sales Person |
|---------|------------|-------|----------------------|--------------|
| 1884    | 11/01/2012 | MCK   | Johans Electric [CE] | User Guide   |

Cust PO / Rel #  /  Order Placed By  V

Cust PO Date  Contract

Job Name

Mark Carton

\*Need By  11/01/2012 \*Billing Currency  US Dollar

\*Tax Exempt  No \*Exchange Rate Final  @ Yes  No

Exemption Reason  Discount %  0.00

Payment Method  Cash / COD No Early Pay Disc

Payment Term

\*Shipping Method  Will Call \$ & H  0.00

Priority  Must Charge \$ & H  One Time Charge

Price Packing Slip  Blind Ship

Shipping Strategy  Central Shipping From  MCK

Bill To  Mary Jameson /  6845 Rock Springs Blvd, Kensington, Montgomery, MD, 20895

Ship To  /

Email Notification  V

Shipping Instructions

255characters remaining on your input limit

Internal Comments

255characters remaining on your input limit

Click **Save & Continue**

Save & Continue >>

Reset

Cancel



# Cancel Order (Line Item)

11/01/2012  
 11:20:58  
 User Guide

**Ximple Solutions 2**  
**Counter Order - Items**

**Sales Order # 1884**

|            |            |                  |                                |
|------------|------------|------------------|--------------------------------|
| Store      | MCK        | Customer         | Johans Electric [CE] (2803.48) |
| Sales Rep. | User Guide | Cust PO / Rel. # | /                              |
| Order Date | 11/01/2012 | Need By          | 11/01/2012                     |
| Pay Method | Cash / COD | Discount %       | 0.00                           |
| Pay Term   |            | Status           | In Fulfillment                 |

|                |               |
|----------------|---------------|
| Total Line     |               |
| Total Discount |               |
| Total Tax      |               |
| S & H          |               |
| <b>Total</b>   | <b>309.47</b> |

| Line#                                 | Item                              | Cust Prod # | Order Qty | Cmt Qty | BO Qty | Trnf Qty | Shp Qty | Canc Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost/* SPA   | GM %  | Total  | View | Cancel | Info | Asso Prod | Lot Pro |
|---------------------------------------|-----------------------------------|-------------|-----------|---------|--------|----------|---------|----------|-------|------------|--------|----------|-----|-----|--------------|-------|--------|------|--------|------|-----------|---------|
| 1                                     | AE AE10001 AE Short Description   |             | 1         | EA      | 0      | 0        | 0       | 1        | 0     | 72.23      | EA     | 0.00     | Yes |     | *85.0000 EA  | 10.01 | 72.23  | View |        | Info |           |         |
| 2                                     | AE AE10002 Ceiling Lamp 10002-B35 |             | 2         | EA      | 0      | 0        | 0       | 2        | 0     | 50.00      | EA     | 0.00     | Yes |     | *45.0000 EA  | 10.00 | 100.00 | View |        | Info | Add       |         |
| <input checked="" type="checkbox"/> 3 | AE AE10005 AE 1-5 AE5             |             | 1         | EA      | 0      | 0        | 0       | 0        | 0     | 117.00     | EA     | 0.00     | Yes |     | *100.0000 EA | 14.53 | 117.00 | View | Cancel | Info | Add       |         |

☐ Error Only
 ☐ Hide Cost
 ☐ Cust Prt#
 Delete Line
Cancel Line
New Prod
Cust Prt#
Upload
Line#: 1 Go

**Line Detail (Line#)**

| Item                 | Avb Qty              | Order Qty            | Force BO Qty         | Price                | Cust Price           | GM% Disc%            | Need By    | Allow BO                 | EBO                      |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------|--------------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 11/01/2012 | <input type="checkbox"/> | <input type="checkbox"/> |

Vend Item #  Mfr Catalog #

Pur. Price

Vend Quote #

|                |                |           |      |
|----------------|----------------|-----------|------|
| Cust Rtnble    | Sell Min Qty   | SPA Cost  | GM % |
| Vend Rtnble    | Sell Incr Qty  | Force SPJ | Sys. |
| Inventory Item | Stock Item     | Active    | Obso |
| Vendor         | Next Pur. Date | Freig     |      |

|                   |   |
|-------------------|---|
| Customer Comments | 128characters remaining on your input limit |
| Comments          | 255characters remaining on your input limit |
| Vendor Comments   | 128characters remaining on your input limit |

**Web Page Dialog**

**Select Cancel Reason**

\*Cancel Reason Default

Save Cancel

Click 'Save'

<< Back
Exit
Locate Stock

Click  
Cancel Line

Select Line

Click 'Save'



# Cancel Order (Stock)

**Xs** Ximple Solutions 2 11/01/2012 11:23:00 User Guide

**Counter Order - Items**

Sales Order # 1884

|            |            |                  |                                |                |        |
|------------|------------|------------------|--------------------------------|----------------|--------|
| Store      | MCK        | Customer         | Johans Electric [CE] (2803.48) | Total Line     | 409.23 |
| Sales Rep. | User Guide | Cust PO / Rel. # | /                              | Total Discount | - 0.00 |
| Order Date | 11/01/2012 | Need By          | 11/01/2012                     | Total Tax      |        |
| Pay Method | Cash / COD | Discount %       | 0.00                           | S & H          |        |
| Pay Term   |            | Status           | In Fulfillment                 | Total          |        |

| Line# | Item Cust Prod #                  | Order Qty | Cmt Qty | BO Qty | Trnf Qty | Shp Qty | Canc Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost*SPA     | GM %  | Total  | View | Cancel | Info | Asso Prod | Prc |
|-------|-----------------------------------|-----------|---------|--------|----------|---------|----------|-------|------------|--------|----------|-----|-----|--------------|-------|--------|------|--------|------|-----------|-----|
| 1     | AE AE10001 AE Short Description   | 1         | EA      | 0      | 0        | 0       | 1        | 0     | 72.23      | EA     | 0.00     | Yes |     | *85.0000 EA  | 10.01 | 72.23  | View | Info   |      |           |     |
| 2     | AE AE10002 Ceiling Lamp 10002-B35 | 2         | EA      | 0      | 0        | 0       | 2        | 0     | 50.00      | EA     | 0.00     | Yes |     | *45.0000 EA  | 10.00 | 100.00 | View | Info   | Add  |           |     |
| 3     | AE AE10005 AE 1-5 AE5             | 1         | EA      | 0      | 0        | 0       | 0        | 0     | 117.00     | EA     | 0.00     | Yes |     | *100.0000 EA | 14.53 | 117.00 | View | Cancel | Info | Add       |     |
| 4     | AE AE10003 Desk Lamp 10003-B35    | 1         | EA      | 1      | 0        | 0       | 0        | 0     | 120.00     | EA     | 0.00     | Yes |     | *75.5000 EA  | 37.08 | 120.00 | View | Cancel | Info | Add       |     |

☐ Error Only ☐ Hide Cost ☐ Cust Prt#

Line#: 1

Select  
Cancel

Lists ALL Warehouses Inventory is Committed At

**Solutions 2** 11/01/2012 11:23:55 User Guide

**Cancel Item**

Item Info (P1320)

| Item                           | Ord Qty | Shipped Qty | Canceled Qty | BO Qty | Prepaid Qty | *Cancel Reason |
|--------------------------------|---------|-------------|--------------|--------|-------------|----------------|
| AE AE10003 Desk Lamp 10003-B35 | 1       | 0           | 0            | 0      | 0           | Sales Error    |

Committed Qty

| Warehouse | Inventory            | Cmt. Qty | BO Qty | Canceled Qty | Shped/Picked Qty | Max Cancel Qty | Cancel Qty |
|-----------|----------------------|----------|--------|--------------|------------------|----------------|------------|
| MCK       | Merchandise for Sale | 1        | 0      | 0            | 0                | 1              | 1          |

Click **Submit**



# Refund Order



## Ximple Solutions 2 Counter Order List

11/01/2012

11:30:28

User Guide

| Order # | Type | Order Date | Store / Warehouse | Customer        | Cust PO | Sales Rep. | Status   | On Hold |
|---------|------|------------|-------------------|-----------------|---------|------------|----------|---------|
| 1885    |      | 11/01/2012 | MCK               | Johans Electric |         | User Guide | Canceled |         |

View  
Copy  
Print  
Refund  
Multimedia

Back To Lookup

Click to view  
items being  
refunded

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Select  
Refund



## Ximple Solutions 2 Counter Order Refund

11/01/2012

11:30:32

User Guide

| Counter Order Refund  |  |
|---|--|
| Order #   | 1885   |
| Customer  | Johans Electric  |
| Refund Amount   | 77.28 US Dollar  |
| Store Register  | MCK - McKeesport   |
| Currency  | US Dollar  |
| Refund Method   | <input checked="" type="radio"/> Cash <input type="radio"/> Check <input type="radio"/> Credit <input type="radio"/> Credit Card |
| Check Pay To  |  |
| Mailing Addr.   |  |
| Cash Comment  |  |
| Credit Card #   |  |
| Expiration (MM/YYYY)  |  |
| Card Holder Name  |  |
| Security Code   |  |
| Address   |  |
| Zip Code  |  |
| Reference   |  |
| <input type="button" value="Swipe Card"/> <input type="button" value="Clear Card"/> |  |

View Refund Items

Click  
Submit










Submit

Cancel




# Refund Order

-- Webpage Dialog






1 / 1


87.6%


Find

No current selection



**Ximple Solutions**  
3829 Farragut Avenue  
Kensington, MD 20895  
Phone (412)678-8826

### Sales Order Refund

Page 1

| Refund # | Date       | Sold at Store | Refund Method |
|----------|------------|---------------|---------------|
| 235      | 11/01/2012 | MCK           | Cash          |

| Sales Order # | Refund Store - Cash Desk |
|---------------|--------------------------|
| 1885          | MCK - McKeesport         |

| Customer Acct # | Customer PO | Processed By |
|-----------------|-------------|--------------|
| 10006           |             | User Guide   |

**Refund To**  
Johans Electric  
6845 Rock Springs Blvd  
Kensington, MD 20895

**Cash Comment**

| Line # | UPC         | MFG-Catalog<br>Item Description<br>Customer Part Number | Qty | UOM | Unit Price | UOM | Order<br>Disc % | Item<br>Disc % | Ext.Total |
|--------|-------------|---|-----|-----|------------|-----|-----------------|----------------|-----------|
| 1      | 10001010001 | AE10001 - Arctic Electric<br>AE Short Description       | 1   | EA  | 72.23      | EA  | 0.00            | 0.00           | 72.23     |

Sub Total  
Tax  
Shipping Charge  
Refund Total

72.23  
5.05  
0.00  
-77.28 US Dollar

Conditions Of Refund  
Refund Comment

Print




## Override System Retrieved Price

### **4 Ways to override price:**

- 1. Set GM% you want to make on line**
- 2. Enter specific price you want to make on line**
- 3. Up price retrieved by system by a %**
- 4. Discount price retrieved by system by a %**



# Override Price – Set GM%


**Ximple Solutions**  
**Sales Order - Items**
01/09/2013  
15:25:25

---

**Sales Order # 2183**

|                  |                |                     |                                  |
|------------------|----------------|---------------------|----------------------------------|
| Store            | Rockville      | Customer (CR Limit) | Custar Electric [AD] (861507.88) |
| Sales Person     | User Guide     | Cust PO / Rel. #    | /                                |
| Order Date       | 01/09/2013     | Need By             | 01/09/2013                       |
| Fulfillment Rule | Complete Order | Discount %          | 0.00 Min for Free Frt 50.00      |
| Status           | WIP            | Contract            |                                  |

**1. Select GM%  
Checkbox  
(based on User  
Authority)**

---

| Line#              | Item<br>Cust Prod # | Order<br>Qty | Cmt.<br>Qty | BO<br>Qty | Trnf.<br>Qty | Shp.<br>Qty | Canc.<br>Qty | Price | Cust<br>Price | Disc<br>% | Allow<br>BO | EBO | SPJ | Cost/*SPA | GM % | Total | View | Lot? | Info | Asso<br>Prod | Lot<br>Proc |
|--------------------|---------------------|--------------|-------------|-----------|--------------|-------------|--------------|-------|---------------|-----------|-------------|-----|-----|-----------|------|-------|------|------|------|--------------|-------------|
| No data was found. |                     |              |             |           |              |             |              |       |               |           |             |     |     |           |      |       |      |      |      |              |             |

☐ Err Only
 ☐ Hide Cost
 ☐ Use Cust Part#

Line # : 1

---

**Line # ( Line Detail )**

| Item  | Avb<br>Qty | Order Qty | Force<br>BO Qty | Price    | Cust.<br>Price                   | <input checked="" type="checkbox"/> GM%<br>Disc% | Need By    | Allow<br>BO | EBO | Cmt |
|---|------------|-----------|-----------------|----------|----------------------------------|--|------------|-------------|-----|-----|
| AE AE10009 Floor Lamp <input type="button" value="V"/> ea <span style="color: red;">Info</span> | 3          | 1         |                 | 45.00 ea | <input type="button" value="V"/> | 25   | 01/09/2013 |             |     |     |

Vendor  Vend Item #  Mfr Catalog #

Pur. Price  Vend Quote #  Lot Item ☐

|                |                       |               |   |                |            |                |           |       |  |       |                    |            |
|----------------|-----------------------|---------------|---|----------------|------------|----------------|-----------|-------|--|-------|--------------------|------------|
| Cust Rtnble    | Y                     | Sell Min Qty  | 0 | SPA Cost       | 35.00      | Y              | GM %      | 22.22 | Min Sales Price                                      | 38.89 | Purch Min/Incr Qty | /          |
| Vend Rtnble    | Y                     | Sell Incr Qty | 0 | Force SPJ      |            |                | Sys. GM % | 10.00 | Price Break  |       | Vend Pro Date      | 09/06/2011 |
| Inventory Item | Y                     | Stock Item    | Y | Active         | Y          |                | Obsolete  | N     | Packaging  | Y     | Customer Line #    |            |
| Vendor         | Arctic Electric, Inc. |               |   | Next Pur. Date | 01/15/2013 | Freight Term   |           |       | Vendor pays if total amount exceeds min. freight set |       |                    | 100.00     |
| Last Pur Proc  | 45.00 ea              |               |   | Curr Pur Proc  | 45.00 ea   | Last Sold Proc |           |       | 45.00 ea   |       |                    |            |

**2. Enter  
GM%**

---

**3. Click  
Calculate  
button**

**2. Enter  
GM%**

Customer Comments: 128characters remaining on your input limit

Comments: Default Sales Item Comment Setup 255characters remaining on your input limit

Vendor Comments: 128characters remaining on your input limit


Warehouse Instruction: WH Memo Field: Item comes in 2 boxes. 128characters remaining on your input limit

Internal Comments: 128characters remaining on your input limit



# Override Price – Enter Price

01/09/2013


**Ximple Solutions**  
**Sales Order - Items**

**1. Select Cust Price** checkbox  
(based on User Authority)

**2. Enter Sales Price**

| Sales Order # 2183 |                |                     |                                  |                        |  |  |  |  |  |  |  |  |       |      |
|--------------------|----------------|---------------------|----------------------------------|------------------------|--|--|--|--|--|--|--|--|-------|------|
| Store              | Rockville      | Customer (CR Limit) | Custar Electric [AD] (861507.88) |                        |  |  |  |  |  |  |  |  |       |      |
| Sales Person       | User Guide     | Cust PO / Rel. #    | /                                |                        |  |  |  |  |  |  |  |  |       |      |
| Order Date         | 01/09/2013     | Need By             | 01/09/2013                       |                        |  |  |  |  |  |  |  |  |       |      |
| Fulfillment Rule   | Complete Order | Discount %          | 0.00                             | Min for Free Frt 50.00 |  |  |  |  |  |  |  |  |       |      |
| Status             | WIP            | Contract            |                                  |                        |  |  |  |  |  |  |  |  |       |      |
|                    |                |                     |                                  |                        |  |  |  |  |  |  |  |  | Total | 2.00 |

| Line#              | Item | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc. Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost/*SPA | GM % | Total | View | Lot? | Info | Asso Prod | Lot Prc |
|--------------------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|
| No data was found. |      |           |          |        |           |          |           |       |            |        |          |     |     |           |      |       |      |      |      |           |         |

☐ Err Only   ☐ Hide Cost   ☐ Use Cust Part#   
 New Prod   Cust Prt#   Upload   
 Line #: 1 Go

Line # ( Line Detail )

| Item  | Avb Qty | Order Qty | Force BO Qty | Price    | Cust. Price                         | GM% Disc% | Need By    | Allow BO                            | EBO | Cmt                                 |
|---|---------|-----------|--------------|----------|-------------------------------------|-----------|------------|-------------------------------------|-----|-------------------------------------|
| AE AE10009 Floor Lamp <span style="float: right;">Info</span> | 3       | 1         |              | 50.00 ea | <input checked="" type="checkbox"/> |           | 01/09/2013 | <input checked="" type="checkbox"/> |     | <input checked="" type="checkbox"/> |

Vendor  Vend Item #

Pur. Price  Vend Quote #

Cust Rtnble Y

Sell Min Qty 0

SPA Cost 35.00

Y

GM % 25.01

Min Sales Price 38.89

Purch Min/Incr Qty /

Vend Rtnble Y

Sell Incr Qty 0

Force SPJ ☐

Sys. GM % 10.00

Price Break

Vend Prc Date 09/06/2011

Inventory Item Y

Stock Item Y

Active Y

Obsolete N

Packaging Y

Customer Line #

Vendor Arctic Electric, Inc.

Next Pur. Date 01/15/2013

Freight Term Vendor pays if total amount exceeds min. freight set

100.00

Last Pur Prc 45.00 ea

Curr Pur Prc 45.00 ea

Last Sold Prc 45.00 ea

Customer Comments Save New Line

128characters remaining on your input limit

Comments Warehouse Instruction

Default Sales Item Comments from Customer Setup

255characters remaining on your input limit

Vendor Comments Internal Comments


128characters remaining on your input limit

<< Back
Continue >>
Exit



# Override Price – Up By %

01/09/2013


**Ximple Solutions**  
**Sales Order - Items**

**1. Enter % to up price by and add 2 dots (..)**

**2. Tab Out** (this will automatically calculate new price)

| Sales Order # 2183 |                |                     |                                |                       |  |  |  |  |  |
|--------------------|----------------|---------------------|--------------------------------|-----------------------|--|--|--|--|--|
| Store              | Rockville      | Customer (CR Limit) | Custar Electric [AD] (881507.8 |                       |  |  |  |  |  |
| Sales Person       | User Guide     | Cust PO / Rel. #    | /                              |                       |  |  |  |  |  |
| Order Date         | 01/09/2013     | Need By             | 01/09/2013                     |                       |  |  |  |  |  |
| Fulfillment Rule   | Complete Order | Discount %          | 0.00                           | Min for Free Frt 50.0 |  |  |  |  |  |
| Status             | WIP            | Contract            |                                |                       |  |  |  |  |  |

| Line#              | Item | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc. Qty | Price | Cust Price | Disc % | Allow BO | EBO | Lot Proc |
|--------------------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|----------|
| No data was found. |      |           |          |        |           |          |           |       |            |        |          |     |          |

☐ Err Only   ☐ Hide Cost   ☐ Use Cust Part#   New Prod   Cust Prt#   Upload   Line #: 1   **Go**


| Line # ( Line Detail ) |                       |               |              |                |                          |                |  |                                     |                          |                                     |                    |            |  |
|------------------------|-----------------------|---------------|--------------|----------------|--------------------------|----------------|--|-------------------------------------|--------------------------|-------------------------------------|--------------------|------------|--|
| Item                   | Avb Qty               | Order Qty     | Force BO Qty | Price          | Cust. Price              | GM% Disc%      | Need By  | Allow BO                            | EBO                      | Cmt                                 |                    |            |  |
| AE AE10009 Floor Lamp  | ea                    | 3             | 1            | 45.00          | ea                       | 15..           | 01/09/2013   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |                    |            |  |
| Vendor                 |                       |               |              | Vend Item #    |                          | Mfr Catalog #  |  |                                     |                          |                                     |                    |            |  |
| Pur. Price             |                       |               |              | Vend Quote #   |                          | Lot Item       |  |                                     |                          |                                     |                    |            |  |
| Cust Rtnble            | Y                     | Sell Min Qty  | 0            | SPA Cost       | 35.00                    | Y              | GM %   | 22.22                               | Min Sales Price          | 38.89                               | Purch Min/Incr Qty | /          |  |
| Vend Rtnble            | Y                     | Sell Incr Qty | 0            | Force SPJ      | <input type="checkbox"/> |                | Sys. GM %  | 10.00                               | Price Break              |                                     | Vend Proc Date     | 09/08/2011 |  |
| Inventory Item         | Y                     | Stock Item    | Y            | Active         | Y                        |                | Obsolete   | N                                   | Packaging                | Y                                   | Customer Line #    |            |  |
| Vendor                 | Arotic Electric, Inc. |               |              | Next Pur. Date | 01/15/2013               | Freight Term   | Vendor pays if total amount exceeds min. freight set |                                     |                          |                                     | 100.00             |            |  |
| Last Pur Proc          | 45.00 ea              |               |              | Curr Pur Proc  | 45.00 ea                 | Last Sold Proc | 45.00 ea   |                                     |                          |                                     |                    |            |  |

|                   |  |                       |  |
|-------------------|--|-----------------------|--|
| Customer Comments | 128characters remaining on your input limit  |                       | <b>Save New Line</b>   |
| Comments          | Default Sales Item Comments from Customer Setup<br>255characters remaining on your input limit | Warehouse Instruction | WH Memo Field: Item comes in 2 boxes.<br>128characters remaining on your input limit |
| Vendor Comments   | 128characters remaining on your input limit  | Internal Comments     | 128characters remaining on your input limit  |

<< Back   Continue >>   Exit



# Override Price – Discount Price



**Ximple Solutions**  
**Sales Order - Items**

01/09/2013  
15:25:35

**1. Enter % to discount**

**Sales Order # 2183**

|                  |                |                     |                                  |
|------------------|----------------|---------------------|----------------------------------|
| Store            | Rockville      | Customer (CR Limit) | Custar Electric [AD] (861507.88) |
| Sales Person     | User Guide     | Cust PO / Rel. #    | /                                |
| Order Date       | 01/09/2013     | Need By             | 01/09/2013                       |
| Fulfillment Rule | Complete Order | Discount %          | 0.00 Min for Free Frt 50.00      |
| Status           | WIP            | Contract            |                                  |

0.00  
- 0.00  
0.00  
2.00  
2.00

| Line#              | Item | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc. Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost/*SPA | GM % | Total | View | Lot? | Info | Asso Prod | Lot Prc |
|--------------------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|
| No data was found. |      |           |          |        |           |          |           |       |            |        |          |     |     |           |      |       |      |      |      |           |         |

☐ Err Only ☐ Hide Cost ☐ Use Cust Part#

Line #: 1

**Line # ( Line Detail )**

| Item  | Avb Qty | Order Qty | Force BO Qty | Price                                     | Cust. Price | GM% Dis% | Need By    | Allow BO                            | EBO                      | Cmt                                 |
|---|---------|-----------|--------------|---|-------------|----------|------------|-------------------------------------|--------------------------|-------------------------------------|
| AE AE10009 Floor Lamp <input type="button" value="V"/> ea <span style="color: red;">Info</span> | 3       | 1         |              | 45.00 ea <input type="button" value="V"/> |             | 5        | 01/09/2013 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Vendor  Vend Item #  Mfr Catalog #

Pur. Price  Vend Quote #  Lot Item ☐

|                |                       |               |   |                |                          |               |  |       |                 |       |                    |                      |
|----------------|-----------------------|---------------|---|----------------|--------------------------|---------------|--|-------|-----------------|-------|--------------------|----------------------|
| Cust Rtnble    | Y                     | Sell Min Qty  | 0 | SPA Cost       | 35.00                    | Y             | GM %   | 22.22 | Min Sales Price | 38.89 | Purch Min/Incr Qty | /                    |
| Vend Rtnble    | Y                     | Sell Incr Qty | 0 | Force SPJ      | <input type="checkbox"/> |               | Sys. GM %  | 10.00 | Price Break     |       | Vend Prc Date      | 09/08/2011           |
| Inventory Item | Y                     | Stock Item    | Y | Active         | Y                        |               | Obsolete   | N     | Packaging       | Y     | Customer Line #    | <input type="text"/> |
| Vendor         | Arotic Electric, Inc. |               |   | Next Pur. Date | 01/15/2013               | Freight Term  | Vendor pays if total amount exceeds min. freight set |       |                 |       | 100.00             |                      |
| Last Pur Prc   | 45.00 ea              |               |   | Curr Pur Prc   | 45.00 ea                 | Last Sold Prc | 45.00 ea   |       |                 |       |                    |                      |

Customer Comments

128characters remaining on your input limit

Comments

Default Sales Item Comments from Customer Setup

255characters remaining on your input limit

Vendor Comments

128characters remaining on your input limit

Warehouse Instruction

WH Memo Field: Item comes in 2 boxes.

128characters remaining on your input limit

Internal Comments

128characters remaining on your input limit



# **Counter Sales Certification**

- 1. Add Order**
  - Will call ship method (4 steps)
  - Add Order w/shipping (COD)
  - Add Order w/shipping (Prepaid)
  - Add Order and mix pay method
  - Add Order, do 4 steps individually
- 2. Commit stock and Product Navigator**
- 3. Modify Sales Prices**
- 4. Copy an Order**
- 5. Search for Counter Order**
- 6. Hold & Release an Order**
- 7. Manage Exceptions**
  - Canceling SO
    - Cancel Whole Order
    - Cancel Line
    - Cancel Stock
  - Refund Order



# Regular Sales Order

Login Page - Microsoft Internet Explorer

View Favorites Tools Help

Search Favorites

Address

Welcome John C. Smith!  
Tuesday, November 24, 2009 02:28PM  
[Log Out](#)

**Sales Module Menu**

- Sales
- Setup
- Pricing
- Counter
- Order Management**
  - Quote
  - Free Form Quote
  - Sales Order**
  - Free Form Order
  - Hold For Warehouse Order
  - Back Order Items
- Reports
- Product Tools
- SPA

**Order Management Submenu**

**Sales Order Submenu Option**

**Help Links**

- FAQ
- Technical Support

**Documentation**

- 01- Navigation and Basic Tasks
  - Administration
  - Systems Parameters
  - Accounts Receivable
  - General Ledger
  - Banking & Bank Reconciliation
  - Accounts Payable
- 08- Project Administration
- 09- Product Catalog
- 10- Warehousing & Shipping Receiving
- 11- Purchasing
- 12- Sales and Order Entry
- 13- Billing
- 99- Customer Gateway

ERP System Master Codes

IBM Business Partner

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javascript:window.open('/Ximple/wd/SalesOrder.do','\_blank','top=80,left=80,width=800,status=yes,height=500,scrollbars=yes,resize=yes'); Local intranet



# Lookup Order

Select  
Lookup  
Parameters



Ximple Solutions

**Sales Order Lookup**

12/03/2009

09:53:20

Jane Doe

**Sales Order Lookup (P1310)**

|                         |  |                                  |   |                                  |    |           |                      |
|-------------------------|--|----------------------------------|---|----------------------------------|----|-----------|----------------------|
| Sales Order #           | <input type="text"/>   | OR                               | Customer P.O.                             | <input type="text"/>             | OR | Invoice # | <input type="text"/> |
| <b>OR</b>               |  |                                  |   |                                  |    |           |                      |
| Customer                | <input type="text" value="Custar Electronics"/>  | <input type="button" value="V"/> | <input type="checkbox"/> Related Customer |                                  |    |           |                      |
| Customer Type           | <input checked="" type="radio"/> All Customer <input type="radio"/> Regular Customer <input type="radio"/> One Time Customer |                                  |   |                                  |    |           |                      |
| Customer Job Name       | <input type="text"/>   |                                  |   |                                  |    |           |                      |
| Date Range              | <input type="text" value="12/02/2009"/>  | <input type="button" value="📅"/> | <input type="text" value="12/03/2009"/>   | <input type="button" value="📅"/> |    |           |                      |
| Sales Rep.              | <input type="text" value="Jane Doe"/> ▼  |                                  |   |                                  |    |           |                      |
| Store                   | <input type="text" value="Baltimore"/> ▼   |                                  |   |                                  |    |           |                      |
| Sales Order Status      | <input type="text" value="All"/> ▼   |                                  |   |                                  |    |           |                      |
| Sales Order On Hold     | <input type="checkbox"/>   |                                  |   |                                  |    |           |                      |
| Direct Ship Orders Only | <input type="checkbox"/>   |                                  |   |                                  |    |           |                      |
| Product                 | <input type="text"/>   | <input type="button" value="V"/> |   |                                  |    |           |                      |
| Vendor                  | <input type="text"/>   | <input type="button" value="V"/> |   |                                  |    |           |                      |

Add Sales Order

Click  
**Lookup**



# Sales Order

Tab Menu

Return to  
Lookup Page

Popup  
Menu

## Popup Menu:

**View:** View SO information

**Book:** Book SO

**Print:** Print SO info (generates pdf file of SO)

**Cancel:** Cancel SO that's been booked

**Release:** Release an On Hold SO

**EDI SO List:** View EDI SO

**Edit:** Edit SO

**Copy:** Create a copy of the SO

**Delete:** Delete SO that's yet to be booked

**Hold:** Put a SO on hold

**Refund:** Refund customer

**Customer Orders:** View orders entered by customer



# Create Sales Order



Ximple Solutions

**Sales Order List**

12/03/2009

09:55:40

Jane Doe

Sales Order List


EDI Sales Order List

| Order # | Type       | Order Date | EDI | Store / Warehouse | Customer         | Cust PO  | Sales Rep. | Dir. Ship | Status | On Hold | PO |
|---------|------------|------------|-----|-------------------|------------------|----------|------------|-----------|--------|---------|----|
| 555     | Cash Order | 12/02/2009 |     | Baltimore         | Custar Electrics | 12345/01 | Jane Doe   |           | Closed |         |    |
| 556     | Cash Order | 12/02/2009 |     | Baltimore         | Custar Electrics | 12345/01 | Jane Doe   |           | Closed |         |    |

Add New

Back

Click **Add New**



Ximple Solutions 2

**New Sales Order - Customer & Store**

11/26/2012

10:43:13

User Guide

New Sales Order - Customer & Store (P1312)

|              |                 |   |              |
|--------------|-----------------|---|--------------|
| Sales Person | User Guide      | ▼ |              |
| *Customer    | Custar Electric | V | Add Customer |
| *Store       | MCK             | ▼ |              |
| *Order Date  | 11/26/2012      | 📅 |              |

Continue >>


Reset

Cancel

Click **Continue**




# Create Sales Order





**Ximple Solutions 2**  
**Sales Order**

11/26/2012  
10:43:42  
User Guide

| Shipping & Billing |            |       |  |
|--------------------|------------|-------|--|
| Order #            | Order Date | Store | Customer   |
|                    | 11/26/2012 | MCK   | Custar Electric [AC]  |
|                    |            |       | Sales Person   |
|                    |            |       | User Guide   |

Cust PO / Rel. #  /


Order Placed By  


Cust PO Date  

Contract

Job Name

Mark Carton

\*Need By  11/26/2012 

\*Billing Currency  US Dollar 

\*Tax Exempt ☒ Yes ☐ No  
 Exemption Reason  Resale

\*Exchange Rate Final  Yes ☒ No  
 Discount %

\*Fulfillment Rule  Ship Complete Order

No Early Pay Disc ☐

Direct Ship ☐ Yes ☒ No

Vendor Quote

\*Shipping Method  UPS Ground

S & H  5.00


\*Priority  Normal


Must Charge S & H ☒ One Time Charge ☐


Price Packing Slip ☒


Blind Ship ☐


Shipping Strategy  Central


Shipping From  MCK 

Bill To  Jamie Smith 

2635 Custar Drive, Rockville, Montgomery, MD, 20852 

Ship To  Jamie Smith 

1002 Custar Drive, Rockville, Montgomery, MD, 20850 

Email Notification  

Shipping Instructions

Default Shipping Instructions from Customer Preferences...

197characters remaining on your input limit

Internal Comments

255characters remaining on your input limit

Save & Continue >>

Reset


Cancel

Click **Save & Continue**  
This is when the system creates the SO



# Create Sales Order

Click to  
Search  
for  
Product


**Ximple Solutions 2**  
**Sales Order - Items**

11/26/2012  
 10:43:56  
 User Guide

---

**Sales Order # 1891**

|  |   |  |            |      |                |        |           |      |       |      |              |             |
|--|---|--|------------|------|----------------|--------|-----------|------|-------|------|--------------|-------------|
| Sales Person: MCK<br>Order Date: 11/26/2012<br>Shipment Rule: Ship Complete Order<br>Contract: WIP | Customer (CR Limit): Custar Electric [AC] (87837.25)<br>Cust PO / Rel. #: /<br>Need By: 11/26/2012<br>Discount %: 0.00<br>Min for Free Frt: 50.00 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Total Line</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Total Discount</td> <td style="text-align: right;">- 0.00</td> </tr> <tr> <td>Total Tax</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>S &amp; H</td> <td style="text-align: right;">5.00</td> </tr> <tr> <td><b>Total</b></td> <td style="text-align: right;"><b>5.00</b></td> </tr> </table> | Total Line | 0.00 | Total Discount | - 0.00 | Total Tax | 0.00 | S & H | 5.00 | <b>Total</b> | <b>5.00</b> |
| Total Line   | 0.00  |  |            |      |                |        |           |      |       |      |              |             |
| Total Discount   | - 0.00  |  |            |      |                |        |           |      |       |      |              |             |
| Total Tax  | 0.00  |  |            |      |                |        |           |      |       |      |              |             |
| S & H  | 5.00  |  |            |      |                |        |           |      |       |      |              |             |
| <b>Total</b>   | <b>5.00</b>   |  |            |      |                |        |           |      |       |      |              |             |

---

| Line# | Item | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc. Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost/*SPA | GM % | Total | View | Lot? | Info | Asso Prod | Lot Prc |
|-------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|
|-------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|

No data was found.

☐ Err Only  
 ☐ Hide Cost  
 ☐ Use Cust Part#

Line # : 1

---

**Line # ( Line Detail )**

| Item   | Avb Qty | Order Qty | Force BO Qty | Price | Cust Price | GM% Disc% | Need By    | Allow BO                            | EBO                      | Cmt                                 |
|--|---------|-----------|--------------|-------|------------|-----------|------------|-------------------------------------|--------------------------|-------------------------------------|
| <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <input type="text"/> <input type="button" value="V"/> </div> |         |           |              |       |            |           | 11/26/2012 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Vendor:       
 Vend Item #      
 Mfr Catalog #

Pur. Price        
 Vend Quote #      
 Lot Item ☐

|                |                |                                    |           |                 |                                      |
|----------------|----------------|------------------------------------|-----------|-----------------|--------------------------------------|
| Cust Rtnble    | Sell Min Qty   | SPA Cost                           | GM %      | Min Sales Price | Purch Min/Incr Qty                   |
| Vend Rtnble    | Sell Incr Qty  | Force SPJ <input type="checkbox"/> | Sys. GM % | Price Break     | Vend Prc Date                        |
| Inventory Item | Stock Item     | Active                             | Obsolete  | Packaging       | Customer Line # <input type="text"/> |
| Vendor         | Next Pur. Date | Freight Term                       |           |                 |                                      |

Customer Comments  
 128characters remaining on your input limit

Comments  
 255characters remaining on your input limit

Vendor Comments  
 128characters remaining on your input limit

Warehouse Instruction  
 128characters remaining on your input limit

Internal Comments  
 128characters remaining on your input limit



# Create Sales Order

**Search Product**

| UPC                | Mfr. Catalog # | Manufacturer | Item Name | Item Description | Stk | Inv | Cust Rtnble | Vend Rtnble | Avb. Qty | UOM | Stock |
|--------------------|----------------|--------------|-----------|------------------|-----|-----|-------------|-------------|----------|-----|-------|
| No data was found. |                |              |           |                  |     |     |             |             |          |     |       |

Search By: Mfr. Catalog #

Select Search Parameters &  
Enter Item to Search  
**Note:** Enter Partial Term & Asterisk (\*)

**Search Results**

**Search Product**

| UPC         | Mfr. Catalog # | Manufacturer        | Item Name            | Item Description                 | Stk | Inv | Cust Rtnble | Vend Rtnble | Avb. Qty | UOM | Stock |
|-------------|----------------|---------------------|----------------------|----------------------------------|-----|-----|-------------|-------------|----------|-----|-------|
| 40001020003 | FAE20003       | Armada Fabrics, LLC | AF FAE20003          | AF FAE20003 FAE Short            | N   | Y   | N           | N           | 0        | YD  | Stock |
| 40001020004 | FAE20004       | Armada Fabrics, LLC | Silk Fabrics FAE 2-4 | AF FAE20004 Silk Fabrics FAE 2-4 | Y   | Y   | Y           | Y           | 0        | YD  | Stock |
| 40001020005 | FAE20005       | Armada Fabrics, LLC | AF FAE20005          | AF FAE20005 FAE20001             | N   | N   | N           | Y           | 990      | YD  | Stock |
| 40001020008 | FAE20008       | Armada Fabrics, LLC | AF FAE20008          | FAE Short                        |     |     |             |             |          |     | Add   |


Search By: Product ID

Select a Product

Click  
**Stock**



# Create Sales Order (Prod. Navigator)



Ximple Solutions 2


**Product Navigator**

11/26/2012

10:35:44

User Guide

Product Info



Product Description

|                  |                     |             |          |   |
|------------------|---------------------|-------------|----------|---|
| Name             | AF FAE20005         | Description | FAE20001 |   |
| Type             | Material            | Generic     | No       | Serialized No   |
| Inv Item         | Yes                 | Stock Item  | No       | Lot No  |
| Obsolete         | No                  | Active      | Yes      | <a href="#" style="background-color: #4a69bd; color: white; padding: 5px 10px; text-decoration: none;">Close Window</a> |
| Brand            | Armada              |             |          |   |
| Manufacturer     | Armada Fabrics, LLC |             |          |   |
| Product Line     | Fabrics             |             |          |   |
| Long Description |                     |             |          |   |

Stock

Pricing

Product

Association

Memo

Packaging

Vendor

Multimedia

Sales

Purchasing

| Branch / Warehouse          | Inventory            | Owner              | Avb. Qty | Ord Qty | BO Qty | Commit Qty                                |
|-----------------------------|----------------------|--------------------|----------|---------|--------|---|
| Gaithersburg / Gaithersburg | Merchandise for Sale | Ximple Solutions 2 | 870      | 0       | 0      | <input style="width: 50px;" type="text"/> |

Search Another

Save

View  
Product Info

Add Item to  
SO &  
Commit Qty

Enter Qty to  
Commit



# Create Sales Order



Ximple Solutions 2  
Sales Order - Items

11/26/2012

10:43:56

User Guide

Sales Order # 1891

|                  |                     |                     |                                 |                |        |
|------------------|---------------------|---------------------|---------------------------------|----------------|--------|
| Store            | MCK                 | Customer (CR Limit) | Custar Electric [AC] (87837.25) | Total Line     | 0.00   |
| Sales Person     | User Guide          | Cust PO / Rel. #    | /                               | Total Discount | - 0.00 |
| Order Date       | 11/26/2012          | Need By             | 11/26/2012                      | Total Tax      | 0.00   |
| Fulfillment Rule | Ship Complete Order | Discount %          | 0.00 Min for Free Frt 50.00     | S & H          | 5.00   |
| Status           | WIP                 | Contract            |                                 | Total          | 5.00   |

| Line# | Item | Order Qty | Cmt. Qty | BO Qty | Trnf. Qty | Shp. Qty | Canc. Qty | Price | Cust Price | Disc % | Allow BO | EBO | SPJ | Cost/*SPA | GM % | Total | View | Lot? | Info | Asso Prod | Lot Prc |
|-------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|
|-------|------|-----------|----------|--------|-----------|----------|-----------|-------|------------|--------|----------|-----|-----|-----------|------|-------|------|------|------|-----------|---------|

No data was found.

☐ Err Only ☐ Hide Cost ☐ Use Cust Part#

New Prod

Cust Prt#

Upload

Line # : 1

Go

Line # ( Line Detail )

| Item   | Avb Qty                   | Order Qty                          | Force BO Qty   | Price                            | Cust. Price        | GM% Disc%  | Need By    | Allow BO                            | EBO                      | Cmt                                 |
|--|---------------------------|------------------------------------|--|----------------------------------|--------------------|------------|------------|-------------------------------------|--------------------------|-------------------------------------|
| AF FAE20005 FAE20001 <input type="checkbox"/> YD <b>Info</b> | 0                         | 20                                 |  | 5.30 YD <input type="checkbox"/> |                    |            | 11/26/2012 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Vendor <input type="checkbox"/>                              | Vend Item #               |                                    | Mfr Catalog #  |                                  |                    |            |            |                                     |                          |                                     |
| Pur. Price <input type="checkbox"/>                          | Vend Quote #              |                                    | Lot Item <input type="checkbox"/>                    |                                  |                    |            |            |                                     |                          |                                     |
| Cust Rtnble N  | Sell Min Qty 1            | SPA Cost 0.00                      | GM % 15.09   | Min Sales Price 5.30             | Purch Min/Incr Qty | /          |            |                                     |                          |                                     |
| Vend Rtnble Y  | Sell Incr Qty 1           | Force SPJ <input type="checkbox"/> | Sys. GM % 15.00                                      | Price Break                      | Vend Prc Date      | 11/16/2011 |            |                                     |                          |                                     |
| Inventory Item Y   | Stock Item N              | Active Y                           | Obsolete N   | Packaging                        | Customer Line #    |            |            |                                     |                          |                                     |
| Vendor Armada Fabrics, LLC                                   | Next Pur. Date 11/26/2012 | Freight Term                       | Vendor pays if total amount exceeds min. freight set |                                  |                    |            |            |                                     |                          | 100.00                              |

|                   |   |                       |   |               |
|-------------------|---|-----------------------|---|---------------|
| Customer Comments | 128characters remaining on your input limit |                       |   | Save New Line |
| Comments          | test for release                            | Warehouse Instruction | 128characters remaining on your input limit |               |
| Vendor Comments   | 128characters remaining on your input limit | Internal Comments     | 128characters remaining on your input limit |               |

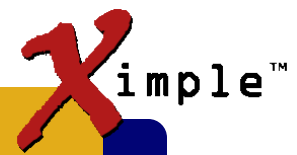
<< Back


Continue >>

Exit



# Create Sales Order





**Ximple Solutions 2**  
**Sales Order - Items**

11/26/2012  
10:45:37  
User Guide

---

**Sales Order # 1891**

|                                       |  |                        |
|---------------------------------------|--|------------------------|
| Store: MCK                            | Customer (CR Limit): Custar Electric [AC] (87837.25) | Total Line: 108.00     |
| Sales Person: User Guide              | Cust PO / Rel. #: /                                  | Total Discount: - 0.00 |
| Order Date: 11/26/2012                | Need By: 11/26/2012                                  | Total Tax: 0.00        |
| Fulfillment Rule: Ship Complete Order | Discount %: 0.00    Min for Free Frt: 50.00          | S & H: 5.00            |
| Status: WIP                           | Contract:  | <b>Total: 111.00</b>   |

---

| Line# | Item<br>Cust Prod #  | Order<br>Qty | Cmt.<br>Qty | BO<br>Qty | Trnf.<br>Qty | Shp.<br>Qty | Canc.<br>Qty | Price   | Cust<br>Price | Disc<br>% | Allow<br>BO | EBO | SPJ | Cost/*SPA | GM %  | Total  | View                 | Lot? | Info                 | Asso<br>Prod        | Lot<br>Prc |
|-------|----------------------|--------------|-------------|-----------|--------------|-------------|--------------|---------|---------------|-----------|-------------|-----|-----|-----------|-------|--------|----------------------|------|----------------------|---------------------|------------|
| 1     | AF FAE20005 FAE20001 | 20 YD        | 20          | 0         | 20           | 0           | 0            | 5.30 YD |               | 0.00      | Yes         |     |     | 4.5000 YD | 15.09 | 108.00 | <a href="#">View</a> |      | <a href="#">Info</a> | <a href="#">Add</a> |            |

☐ Err Only   
 ☐ Hide Cost   
 ☐ Use Cust Part#   
 [Del Line](#)   
 [Lost Sale](#)   
 [New Prod](#)   
 [Cust Prt#](#)   
 [Upload](#)   
Line #: 1 [Go](#)

---

**Line # ( Line Detail )**

| Item                          | Avb<br>Qty | Order Qty | Force<br>BO Qty | Price | Cust.<br>Price | GM%<br>Disc% | Need By    | Allow<br>BO              | EBO                      | Cmt                      |
|-------------------------------|------------|-----------|-----------------|-------|----------------|--------------|------------|--------------------------|--------------------------|--------------------------|
| <input type="text" value=""/> |            |           |                 |       |                |              | 11/26/2012 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Vendor:

Pur. Price:

Vend Item #:

Vend Quote #:

Mfr Catalog #:

Lot Item: ☐

|             |                |                                    |              |                 |                                      |
|-------------|----------------|------------------------------------|--------------|-----------------|--------------------------------------|
| Cust Rtnble | Sell Min Qty   | SPA Cost                           | GM %         | Min Sales Price | Purch Min/Incr Qty                   |
| Vend Rtnble | Sell Incr Qty  | Force SPJ <input type="checkbox"/> | Sys. GM %    | Price Break     | Vend Prc Date                        |
| by Item     | Stock Item     | Active                             | Obsolete     | Packaging       | Customer Line # <input type="text"/> |
|             | Next Pur. Date |                                    | Freight Term |                 |                                      |

Customer Comments:

128characters remaining on your input limit

[Save New Line](#)

Comments:

255characters remaining on your input limit

Warehouse Instruction:

128characters remaining on your input limit

Vendor Comments:

128characters remaining on your input limit

Internal Comments:

128characters remaining on your input limit


[<< Back](#)   
 [Continue >>](#)   
 [Exit](#)

Click  
Continue



# Create Sales Order - Payment

From  
Customer  
Setup



Ximple Solutions 2

**Sales Order Payment**

11/26/2012  
10:47:08  
User Guide

**Sales Order # 1891**

|                  |                     |                     |                                 |                |        |
|------------------|---------------------|---------------------|---------------------------------|----------------|--------|
| Store            | MCK                 | Customer (CR Limit) | Custar Electric [AC] (87837.25) | Total Line     | 106.00 |
| Sales Person     | User Guide          | Cust PO / Rel. #    | /                               | Total Discount | - 0.00 |
| Order Date       | 11/26/2012          | Need By             | 11/26/2012                      | Total Tax      | 0.00   |
| Fulfillment Rule | Ship Complete Order | Discount %          | 0.00                            | S & H          | 5.00   |
| Status           | WIP                 | Contract            |                                 | Total          | 111.00 |

**Customer qualify for Free Freight, Are you sure to charge Shipping?**

|                   |  |                      |  |
|-------------------|--|----------------------|--|
| *Payment Method   | On Account ▼                             | Credit Card #        | <input style="width: 95%;" type="text"/>   |
| Payment Terms     | Net 30 Prox ▼                            | Expiration (MM/YYYY) | <input style="width: 15%;" type="text"/> <input style="width: 15%;" type="text"/>  |
| Reference         | <input style="width: 80%;" type="text"/> | Card Holder Name     | <input style="width: 80%;" type="text"/> Security Code <input style="width: 10%;" type="text"/>                              |
| S & H             | 5.00                                     | Address              | <input style="width: 80%;" type="text"/>   |
| Must Charge S & H | <input checked="" type="checkbox"/>      | Zip Code             | <input style="width: 20%;" type="text"/> <input type="button" value="Swipe Card"/> <input type="button" value="Clear Card"/> |

Click **Save & Book**



# Sales Order List



Ximple Solutions 2

**Sales Order List**

01/09/2013

11:25:17

User Guide

Sales Order List
EDI Sales Order List
Customer Orders
Pend Invoice

| Order # | Type           | Order Date | EDI | Store / Warehouse | Customer        | Cust PO / Rel. # | Sales Rep. | Dir. Ship | Status | On Hold | PO |
|---------|----------------|------------|-----|-------------------|-----------------|------------------|------------|-----------|--------|---------|----|
| 1891    | Standard Order | 11/26/2012 |     | MCK               | Custar Electric |                  | User Guide |           | Booked |         |    |

Add New

Order # 
Go
Back
Refresh

Status of SO



## Sales Order Extras

1. EBO – Emergency Back Orders
2. Lot Items in SO
3. Direct Ship SO

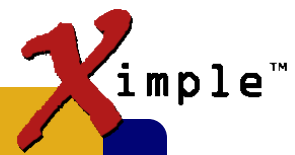


## Direct Ship SO

1. Click **Add New** from SO List page (or SO Lookup page)
2. Enter customer Info and click **Continue**
3. Complete header form; make sure you set the **Direct Ship** flag = Yes, and click **Save & Continue**
4. Enter SO lines, complete the vendor information for the line & click **Save New Line**
5. Click **Continue** to go to Payment Info page
6. Select the **Approve PO** checkbox and click **Save & Book**



# Create Sales Order – Direct Ship



**Xs** Ximple Solutions 2 11/26/2012 10:49:33 User Guide

**Sales Order**

| Shipping & Billing |            |       |                      |              |
|--------------------|------------|-------|----------------------|--------------|
| Order #            | Order Date | Store | Customer             | Sales Person |
|                    | 11/26/2012 | MCK   | Custar Electric [AC] | User Guide   |

Cust PO / Rel. # / Order Placed By

Cust PO Date Contract

Job Name

Mark Carton

\*Need By 11/26/2012 \*Billing Currency US Dollar

\*Tax Exempt Yes No \*Exchange Rate Final Yes No

Exemption Reason Resale Discount %

\*Fulfillment Rule Ship Complete Order No Early Pay Disc

**Direct Ship** Yes No

\*Shipping Method UPS Ground S & H

\*Priority Normal Must Charge S & H One Time Charge

Price Packing Slip Blind Ship

Shipping Strategy Shipping From

Bill To Jamie Smithe / 2635 Custar Drive, Rockville, Montgomery, MD, 20852

Ship To Jamie Smithe / 10002 Custar Drive, Rockville, Montgomery, MD, 20850

Email Notification

Shipping Instructions Default Shipping Instructions from Customer Preferences...  
197characters remaining on your input limit

Internal Comments  
255characters remaining on your input limit


Save & Continue >> Reset Cancel

MUST  
select  
**Direct  
Ship**

Click **Save &  
Continue**



# Create Sales Order – Direct Ship



**Ximple Solutions 2**  
**Sales Order - Items**

11/26/2012  
10:49:46  
User Guide

Sales Order # 1892

|                  |                     |                     |                                 |
|------------------|---------------------|---------------------|---------------------------------|
| Store            | MCK                 | Customer (CR Limit) | Custar Electric [AC] (87731.25) |
| Sales Person     | User Guide          | Cust PO / Rel. #    | /                               |
| Order Date       | 11/26/2012          | Need By             | 11/26/2012                      |
| Fulfillment Rule | Ship Complete Order | Discount %          | 0.00 Min for Free Frt 50.00     |
| Status           | WIP                 | Contract            |                                 |

|                |        |
|----------------|--------|
| Total Line     | 0.00   |
| Total Discount | - 0.00 |
| Total Tax      | 0.00   |
| S & H          | 0.00   |
| Total          | 0.00   |

| Line# | Item<br>Cust Prod # | Order<br>Qty | Cmt.<br>Qty | BO<br>Qty | Trnf.<br>Qty | Shp.<br>Qty | Canc.<br>Qty | Price | Cust<br>Price | Disc<br>% | Allow<br>BO | EBO | SPJ | Cost*SPA | GM % | Total | View | Lot? | Info | Asso<br>Prod | Lot<br>Prc |
|-------|---------------------|--------------|-------------|-----------|--------------|-------------|--------------|-------|---------------|-----------|-------------|-----|-----|----------|------|-------|------|------|------|--------------|------------|
|-------|---------------------|--------------|-------------|-----------|--------------|-------------|--------------|-------|---------------|-----------|-------------|-----|-----|----------|------|-------|------|------|------|--------------|------------|

No data was found.

Err Only ☐ Hide Cost ☐ Use Cust Part# ☐

New Prod Cust Prt# Upload

Line #: 1 Go

Line # ( Line Detail )

| Item                               | Avb<br>Qty | Order Qty | Force<br>BO Qty | Price    | Cust.<br>Price | GM%<br>Disc% | Need By    | Allow<br>BO | EBO | Cmt |
|------------------------------------|------------|-----------|-----------------|----------|----------------|--------------|------------|-------------|-----|-----|
| AE AE10002 Ceiling Lam [v] EA Info | 83         | 10        |                 | 45.11 EA |                |              | 11/26/2012 |             |     |     |

Vendor Arctic Electric [v]

Pur. Price 45.11 US Dollar Unit - EA

Vend Item # 10001010002

Vend Quote #

Mfr Catalog # AE10022

Lot Item

|                        |                           |                |  |                       |                           |
|------------------------|---------------------------|----------------|--|-----------------------|---------------------------|
| Cust Rtnble Y          | Sell Min Qty 0            | SPA Cost 45.00 | GM % 0.00  | Min Sales Price 50.13 | Purch Min/Incr Qty 10 / 0 |
| Vend Rtnble N          | Sell Incr Qty 0           | Force SPJ      | Sys. GM % 10.00  | Price Break           | Vend Prc Date 09/11/2012  |
| Inventory Item N       | Stock Item N              | Active Y       | Obsolete N   | Packaging             | Customer Line #           |
| Vendor Arctic Electric | Next Pur. Date 11/30/2012 | Freight Term   | Vendor pays if total amount exceeds min. freight set 20.00 |                       |                           |

Customer Comments

128characters remaining on your input limit

test for release

255characters remaining on your input limit

Warehouse Instruction

128characters remaining on your input limit

Vendor Comments

128characters remaining on your input limit

Internal Comments

128characters remaining on your input limit

Save New Line

<< Back

Continue >>

Exit

Vendor &  
Pur. Price

Click to  
Calc GM%

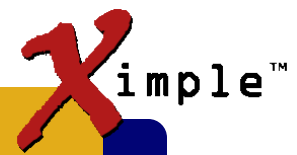
Vendor  
Quote #


Click **Save**  
**New Line**

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# Create Sales Order – Direct Ship





**Ximple Solutions 2**  
**Sales Order - Items**

11/26/2012  
10:51:54  
User Guide

---

**Sales Order # 1892**

|                                       |  |                        |
|---------------------------------------|--|------------------------|
| Store: MCK                            | Customer (CR Limit): Custar Electric [AC] (87731.25) | Total Line: 677.80     |
| Sales Person: User Guide              | Cust PO / Rel. #: /                                  | Total Discount: - 0.00 |
| Order Date: 11/26/2012                | Need By: 11/26/2012                                  | Total Tax: 0.00        |
| Fulfillment Rule: Ship Complete Order | Discount %: 0.00    Min for Free Frt 50.00           | S & H: 0.00            |
| Status: WIP                           | Contract:  | Total: 677.80          |

---

| Line# | Item<br>Cust Prod #               | Order<br>Qty | Cmt.<br>Qty | BO<br>Qty | Trnf.<br>Qty | Shp.<br>Qty | Canc.<br>Qty | Price | Cust<br>Price | Disc<br>% | Allow<br>BO | EBO | SPJ | Cost*SPA | GM % | Total | View   | Lot? | Info | Asso<br>Prod | Lot<br>Prc |
|-------|-----------------------------------|--------------|-------------|-----------|--------------|-------------|--------------|-------|---------------|-----------|-------------|-----|-----|----------|------|-------|--------|------|------|--------------|------------|
| 1     | AE AE10002 Ceiling Lamp 10002-B35 | 10           | EA          | 0         | 10           | 0           | 0            | 50.13 | EA            | 0.00      |             |     |     | 50.3866  | EA   | 10.01 | 501.30 | View | Info | Add          |            |
| 2     | EA EA10002 EA 1-2                 | 10           | EA          | 0         | 10           | 0           | 0            | 17.65 | EA            | 0.00      |             |     |     | 15.0000  | EA   | 15.01 | 176.50 | View | Info |              |            |

☐ Err Only   
 ☐ Hide Cost   
 ☐ Use Cust Part#   
 
  
   
   
   
 
Line #: 1

---

**Line # ( Line Detail )**

| Item                          | Avb<br>Qty | Order Qty | Force<br>BO Qty | Price | Cust.<br>Price | GM%<br>Disc% | Need By    | Allow<br>BO | EBO | Cmt |
|-------------------------------|------------|-----------|-----------------|-------|----------------|--------------|------------|-------------|-----|-----|
| <input type="text" value=""/> |            |           |                 |       |                |              | 11/26/2012 |             |     |     |

Vendor:   
 Pur. Price:

Vend Item #:   
 Vend Quote #:

Mfr Catalog #:   
 Lot Item: ☐

|                |                |                                    |              |                 |   |
|----------------|----------------|------------------------------------|--------------|-----------------|---|
| Cust Rtnble    | Sell Min Qty   | SPA Cost                           | GM %         | Min Sales Price | Purch Min/Incr Qty                            |
| Vend Rtnble    | Sell Incr Qty  | Force SPJ <input type="checkbox"/> | Sys. GM %    | Price Break     | Vend Prc Date                                 |
| Inventory Item | Stock Item     | Active                             | Obsolete     | Packaging       | Customer Line # <input type="text" value=""/> |
| Vendor         | Next Pur. Date |                                    | Freight Term |                 |   |

Customer Comments:   
 128characters remaining on your input limit

Comments:   
 255characters remaining on your input limit

Warehouse Instruction:   
 128characters remaining on your input limit


Vendor Comments:   
 128characters remaining on your input limit

Internal Comments:   
 128characters remaining on your input limit

Click  
Continue



# Create Sales Order – (DS or EBO Payment)



Ximple Solutions 2

**Sales Order Payment**

11/26/2012

10:52:48

User Guide

Sales Order # 1892

|                  |                     |                     |                                 |                |        |
|------------------|---------------------|---------------------|---------------------------------|----------------|--------|
| Store            | MCK                 | Customer (CR Limit) | Custar Electric [AC] (87731.25) | Total Line     | 677.80 |
| Sales Person     | User Guide          | Cust PO / Rel. #    | /                               | Total Discount | - 0.00 |
| Order Date       | 11/26/2012          | Need By             | 11/26/2012                      | Total Tax      | 0.00   |
| Fulfillment Rule | Ship Complete Order | Discount %          | 0.00                            | S & H          | 0.00   |
| Status           | WIP                 | Contract            |                                 | Total          | 677.80 |

\*Payment Method On Account Credit Card #

Payment Terms Net 30 Prox Expiration (MM/YYYY)

Reference  Card Holder Name  Security Code

S & H 0.00 Address

Must Charge S & H ☒ Zip Code  Swipe Card Clear Card

| Vendor                        | PO Total         | Min Ord Amt | Min For Free Frt | Communication Method   | Ship. Method                                   |
|-------------------------------|------------------|-------------|------------------|--|--|
| Arctic Electric               | 451.10 US Dollar | 0.00        | 20.00            | <input checked="" type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> EDI | Best Way                                       |
|                               |                  |             |                  | Vendor Pays  | <input checked="" type="checkbox"/> Approve PO |
| Vend Promo Code <span></span> |                  |             |                  |  |  |
| Ertime Alliance               | 150.00 US Dollar | 10.00       | 100.00           | <input checked="" type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> EDI | Best Way                                       |
|                               |                  |             |                  | Vendor Pays  | <input type="checkbox"/> Approve PO            |
| Vend Promo Code <span></span> |                  |             |                  |  |  |

<< Back Save Save & Book Cancel



# Create Sales Order – (DS or EBO Print PO)

**Xs** Ximple Solutions 2 11/26/2012 10:53:05  
**Send PO List** User Guide

| PO # | Order Date | Vendor          | PO Type | Branch | Warehouse | Purchase Agent | Status   | Print                               | Fax                      | Email                    |
|------|------------|-----------------|---------|--------|-----------|----------------|----------|-------------------------------------|--------------------------|--------------------------|
| 1585 | 11/26/2012 | Arctic Electric | D.S. PO | MCK    | MCK       | User Guide     | Approved | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Total PO to be Sent: 1 0 0

Done Failed **Finish** Cancel **Process PO**

Click **Process PO**

Click **Finish**

-- Webpage Dialog

**Purchase Order** Page 1

**Xs** Ximple Solutions, LLC  
 Ximple Solutions  
 3829 Farragut Avenue  
 Kensington, MD 20895  
 Phone(412)678-8826

| Purchase Order # | Quote Ref #        | Purchase Branch              | Payment Method   |
|------------------|--------------------|------------------------------|------------------|
| 1585             |                    | MCK                          | On Account       |
| PO Date          | Promo Code         | Branch DUNS #                | Payment Term     |
| 11/26/2012       |                    | 002915775                    | 1% 10th Net 30th |
| Need By Date     | ShipVia            | Freight Term                 |                  |
| ASAP             | Best Way           | Vendor Pays (Ship Complete ) |                  |
| Purchasing Agent |                    |                              |                  |
| User Guide       | Fax: (301)333-4444 |                              |                  |

| Vendor  | Bill To   | Ship To Customer  |
|---|---|---|
| Arctic Electric<br>10001 Arctic Drive<br>Rockville, MD 20850<br>DUNS #: | Ximple Solutions 2<br>PO Box #489<br>McKeesport, PA 15134-0489<br>DUNS #: 002915775<br>Distr Acct: 100010-R | Custar Electric<br>Jamie Smithe<br>(301)111-3245<br>10002 Custar Drive<br>Rockville, MD 20850 |

| LINE # | VENDOR ITEM # | QTY   | MFR CATALOG # / ITEM NAME / VEND QUOTE / COMMENTS | UNIT PRICE | DISC % | EXT. PRICE |
|--------|---------------|-------|---|------------|--------|------------|
| 1      | 10001010002   | 10 EA | AE10022<br>Ceiling Lamp 10002-B35<br>Need By:     | 45.11 EA   |        | 451.10     |

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53



# Hold Sales Order

Select  
**Hold**



Ximple Solutions  
**Sales Order List**

12/03/2009  
10:24:48  
Jane Doe

Sales Order List EDI Sales Order List

| Order # | Type           | Order Date | EDI | Store / Warehouse | Customer           | Cust PO   | Sales Rep. | Dir. Ship | Status | On Hold | PO |
|---------|----------------|------------|-----|-------------------|--------------------|-----------|------------|-----------|--------|---------|----|
| 555     | Cash Order     | 12/02/2009 |     | Baltimore         | Custar Electronics | 12345/01  | Jane Doe   |           | Closed |         |    |
| 556     | Cash Order     | 12/02/2009 |     | Baltimore         | Custar Electronics | 12345/01  | Jane Doe   |           | Closed |         |    |
| 557     | Standard Order | 12/03/2009 |     | Baltimore         | Custar Electronics | 120309/02 | Jane Doe   |           | Booked |         |    |

View  
Edit  
Cancel  
**Hold**  
Copy  
Print  
Edit Cust PO

© 2000-20



Ximple Solutions  
**Sales Order Hold / Release**

12/03/2009  
10:26:42  
Jane Doe

Sales Order # 557

|                  |              |                     |                    |                |        |
|------------------|--------------|---------------------|--------------------|----------------|--------|
| Store            | Baltimore    | Customer (CR Limit) | Custar Electronics | Total Line     | 587.40 |
| Sales Person     | Jane Doe     | Cust PO / Rel. #    | 120309 / 02        | Total Discount | - 0.00 |
| Order Date       | 12/03/2009   | Need By             | 12/03/2009         | Total Tax      | 0.00   |
| Fulfillment Rule | Availability | Discount %          | 0.00               | S & H          | 2.00   |
| Status           | Booked       | Contract            |                    | Total          | 589.40 |

Hold Order

Hold Reason  OR ☐ Comment Only

Comments

199characters remaining on your input limit


Save

Reset

Cancel

Hold / Release History

| Status | Reason | Comments | User | Date |
|--------|--------|----------|------|------|
|--------|--------|----------|------|------|

 No data was found.

Click **Save** to  
Place the Order  
on Hold



# Release Sales Order (non credit hold)

Select  
Release



Ximple Solutions  
**Sales Order List**

12/03/2009

10:28:51

Jane Doe

Sales Order List

EDI Sales Order List

| Order # | Type       | Order Date | EDI | Store / Warehouse | Customer           | Cust PO   | Sales Rep. | Dir. Ship | Status | On Hold | PO |
|---------|------------|------------|-----|-------------------|--------------------|-----------|------------|-----------|--------|---------|----|
| 555     | Cash Order | 12/02/2009 |     | Baltimore         | Custar Electronics | 12345/01  | Jane Doe   |           | Closed |         |    |
| 556     | Cash Order | 12/02/2009 |     | Baltimore         | Custar Electronics | 12345/01  | Jane Doe   |           | Closed |         |    |
| 557     | Cash Order | 12/03/2009 |     | Baltimore         | Custar Electronics | 120309/02 | Jane Doe   |           | Booked | Yes     |    |

View  
Release  
Edit  
Cancel  
Copy  
Print  
Edit Cust PO

Back

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Ximple Solutions  
**Sales Order Hold / Release**

12/03/2009

10:30:55

Jane Doe

Sales Order # 557

|                  |              |                     |                    |                |        |
|------------------|--------------|---------------------|--------------------|----------------|--------|
| Store            | Baltimore    | Customer (CR Limit) | Custar Electronics | Total Line     | 587.40 |
| Sales Person     | Jane Doe     | Cust PO / Rel. #    | 120309 / 02        | Total Discount | - 0.00 |
| Order Date       | 12/03/2009   | Need By             | 12/03/2009         | Total Tax      | 0.00   |
| Fulfillment Rule | Availability | Discount %          | 0.00               | S & H          | 2.00   |
| Status           | Booked       | Contract            |                    | Total          | 589.40 |

Release Order

Release Reason Account Payment Mailed OR ☐ Comment Only

Comments Type in the appropriate comment for the reason selected.

199characters remaining on your input limit

Save

Reset

Cancel

Hold / Release History

| Status | Reason               | Comments   | User     | Date                   |
|--------|----------------------|--|----------|------------------------|
| Hold   | Waiting for Approval | Type in the comments appropriate for the reason selected | Jane Doe | 12/03/2009<br>10:28:50 |

Click **Save** to  
Release the  
Order



# Copy Sales Order

 Ximple Solutions  
**Sales Order List**

12/03/2009  
11:30:32  
Jane Doe

Sales Order List | EDI Sales Order List


| Order # | Type           | Order Date | EDI | Store / Warehouse | Customer        | Cust PO   | Sales Rep. | Dir. Ship | Status         | On Hold | PO |
|---------|----------------|------------|-----|-------------------|-----------------|-----------|------------|-----------|----------------|---------|----|
| 557     | Standard Order | 12/03/2009 |     | Baltimore         | Custar Electric | 120309/02 | Jane Doe   |           | In Fulfillment |         |    |

View  
Edit  
Cancel  
Hold  
Copy  
Print  
Edit Cust PO

Back

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Site design by Ximple Corporation.

Select  
Copy

 Ximple Solutions  
**Copy Sales Order**

12/03/2009  
11:32:11  
Jane Doe

Copy Sales Order (P1321)

Copy From Order # 557

Sales Person Jane Doe

\*Customer Gangel Electric

\*Store Baltimore

\*Order Date 12/03/2009

\*Need By Date 12/03/2009

Direct Ship ☐ Yes ☒ No

Submit Reset Cancel

Click 'Submit'



# Single Branch Sales Order Certification

## • Single Branch

1. Search for Orders
2. Fluent entry
  - Regular Orders
  - Direct Ships
  - EBO
3. Modify Sales Prices
4. Copy an Order
5. Manage exceptions
  - Canceling SO
    - Cancel Whole Order
    - Cancel Line
    - Cancel Stock
  - Refund Order
6. Credit Holds



# Multiple Branch Sales Order Certification

## • Multiple Branches

1. Search for Orders
2. Understanding the workgroup
3. Fluent entry
  - Regular Orders
    - Commit Stock From other WH
  - Direct Ships
  - EBO
4. Manage exceptions
  - Canceling SO
    - Cancel Whole Order
    - Cancel Line
    - Cancel Stock
  - Refund Order
  - Cancel Transfers
5. Credit Holds



# Quote

Login Page - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address

Welcome John C. Smith!  
Tuesday, November 24, 2009 02:28PM  
[Log Out](#)

Ximple Solutions, LLC

**Sales**

- Setup
- Pricing
- Counter
- Order Management**
  - Quote**
    - Free Form Quote
    - Sales Order
    - Free Form Order
    - Hold For Warehouse Order
    - Back Order Items
  - Sales Return
  - Reports
  - Product Tools
  - SPA

**Help Links**

- FAQ
- Technical Support

**Documentation**

- 01- Navigation and Basic Tasks
- 02- Administration
  - 02-1- System Parameters
  - 02-2- Accounts Receivable
  - 02-3- General Ledger
  - 02-4- Paying & Bank Reconciliation
  - 02-5- Accounts Payable
- 03- Project Administration
- 09- Product Catalog
- 10- Warehousing & Shipping Receiving
- 11- Purchasing
- 12- Sales and Order Entry
- 13- Billing
- 99- Customer Gateway

ERP System Master Codes

IBM Business Partner

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javascript:window.open('/Ximple/wd/Quote.do','\_blank','top=80,left=80,width=800,status=yes,height=500,scrollbars=yes,resizab

Local intranet

Sales Module Menu


Order Management Submenu

Quote Submenu Option



# Quote Lookup

Select  
Quote  
Lookup  
Parameters



Ximple Solutions

**Quote Lookup**

12/03/2009

12:05:58

Jane Doe

Quote Lookup (P1295)

|                   |  |   |   |
|-------------------|--|---|---|
| Quote #           | <input type="text"/>   |   |   |
|                   | Or   |   |   |
| Customer          | <input type="text"/>   | <input type="button" value="v"/>  | <input type="checkbox"/> Related Customer |
| Customer Type     | <input checked="" type="radio"/> All Customer <input type="radio"/> Regular Customer <input type="radio"/> One Time Customer |   |   |
| Customer Job Name | <input type="text"/>   |   |   |
| Quote Date Range  | <input type="text" value="12/03/2009"/> <input type="button" value="fc"/>  | <input type="text" value="12/03/2009"/> <input type="button" value="fc"/> |   |
| Sales Rep.        | <input type="text" value="Jane Doe"/> ▼  |   |   |
| Store             | <input type="text" value="Baltimore"/> ▼   |   |   |
| Quote Status      | <input type="text" value="All"/> ▼   |   |   |
| Product           | <input type="text"/>   | <input type="button" value="v"/>  |   |
| Vendor            | <input type="text"/>   | <input type="button" value="v"/>  |   |

Click to  
Add Quote

Click **Lookup**



# Quote



**Ximple Solutions**  
**Quote List**

12/03/2009  
12:08:23  
Jane Doe

| Quote # | Type | Store / Warehouse | Customer         | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status |
|---------|------|-------------------|------------------|------------|--------------|---------------|-------------|----------|------------|--------|
| 79      |      | Baltimore         | Custar Electrics | 08/04/2009 | 08/04/2009   |               | 08/04/2009  |          | User Guide | WIP    |

View  
Edit  
Approve  
Print  
Print WO Price  
Delete  
Copy

[Back](#)

[Return to Lookup Page](#)

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Popup Menu

## Popup Menu:

**View:** View Quote information

**Edit:** Edit Quote (Shipping & Billing and Items Information)

**Approve:** Approve quote

**Reject:** Reject a quote that has been approved

**Make Order:** Create a sales order of the approved quote

**Print:** Print quote info (generates pdf file)

**Print WO Price:** Print quote info without showing the price (generates pdf file)

**Delete:** Delete quote

**Copy:** Make a copy of the quote



# Create Quote



Ximple Solutions

**Quote List**

12/03/2009

12:11:31

Jane Doe

| Quote # | Type  | Store / Warehouse | Customer         | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status |
|---------|-------|-------------------|------------------|------------|--------------|---------------|-------------|----------|------------|--------|
| 79      | Quote | Baltimore         | Custar Electrics | 08/04/2009 | 08/04/2009   |               | 08/04/2009  |          | User Guide | WIP    |

[Add New](#)
[Back](#)

Click  
**Add New**



Ximple Solutions 2

**New Quote - Customer & Store**

10/08/2012

10:37:43

User Guide

New Quote - Customer & Store (P1298)

|               |                 |  |                              |
|---------------|-----------------|--|------------------------------|
| *Sales Person | User Guide      |  |                              |
| *Customer     | Custar Electric | <input type="checkbox"/> One Time Customer | <a href="#">Add Customer</a> |
| *Store        | SA              |  |                              |
| *Quote Date   | 10/08/2012      |  |                              |


[Continue >>](#)
[Reset](#)
[Cancel](#)

**Continue** to  
Next Page



# Create Quote

Click to  
Search for  
Product



**Ximple Solutions 2**  
**Quote - Items**

04/16/2012  
07:48:41  
User Guide

---

**Quote # 242**

|                  |                     |            |                 |                |        |
|------------------|---------------------|------------|-----------------|----------------|--------|
| Person           | MCK                 | Customer   | Custar Electric | Total Line     | 0.00   |
| User Guide       |                     | Need By    | 04/16/2012      | Total Discount | - 0.00 |
| Quote Date       | 04/16/2012          | Discount % | 0.00            | Total Tax      | 0.00   |
| Valid Until      |                     | Status     | WIP             | S & H          | 0.00   |
| Fulfillment Rule | Ship Complete Order | Job Name   |                 | Total          | 0.00   |

| Line#              | Item | Order Qty | DS/EBO Qty | Price | Cust Price | Disc % | Allow BO | EBO | Dir Ship | SPJ | Cost*/SPA | GM % | DS/EBO Cost*/SPA | DS/EBO GM % | Total | Lot? | Info | Asso Prod | Lot Prc |
|--------------------|------|-----------|------------|-------|------------|--------|----------|-----|----------|-----|-----------|------|------------------|-------------|-------|------|------|-----------|---------|
| No data was found. |      |           |            |       |            |        |          |     |          |     |           |      |                  |             |       |      |      |           |         |

☐ Est Only
 ☐ Hide Cost
 ☐ Use Cust Part#

Position to Line# :

---

**Line Detail ( Line # )**

| Item                          | Avb Qty | Qty | DS/EBO Qty | Price | Cust. Price | GM% Disc% | Need By    | Allow BO | EBO | Dir Ship |
|-------------------------------|---------|-----|------------|-------|-------------|-----------|------------|----------|-----|----------|
| <input type="text" value=""/> |         |     |            |       |             |           | 04/16/2012 |          |     |          |

Vendor

Pur. Price

Vend Item #

Vend Quote #

Mfr Catalog #

Lot Item ☐

|                |               |                |                          |              |   |                 |   |                |
|----------------|---------------|----------------|--------------------------|--------------|---|-----------------|---|----------------|
| Cust Rtnble    | Sell Min Qty  | SPA Cost       | /                        | GM %         | / | Min Sales Price | / | Purch Min Qty  |
| Vend Rtnble    | Sell Incr Qty | Force SPJ      | <input type="checkbox"/> | Sys. GM %    |   | Price Break     |   | Purch Incr Qty |
| Inventory Item | Stock Item    | Active         |                          | Obsolete     |   | Packaging       |   | Vend Prc Date  |
| Vendor         |               | Next Pur. Date |                          | Freight Term |   |                 |   |                |

Customer Comments

128characters remaining on your input limit

Warehouse Instruction

128characters remaining on your input limit

Comments

255characters remaining on your input limit

Internal Comments

128characters remaining on your input limit

Vendor Comments

128characters remaining on your input limit



# Create Quote

**Search Product**

| UPC                | Mfr. Catalog # | Manufacturer | Item Name | Item Description | Stk | Inv | Cust Rtnble | Vend Rtnble | Avb. Qty | UOM | Stock |
|--------------------|----------------|--------------|-----------|------------------|-----|-----|-------------|-------------|----------|-----|-------|
| No data was found. |                |              |           |                  |     |     |             |             |          |     |       |

Search By: Mfr. Catalog #  Position To  Go Close Window

- Product Name
- Category
- Product Line
- Vendor
- Manufacturer
- Customer Product Number
- Mfr. Catalog #**
- SKU
- UPC

Select Search Parameters &  
Enter Item to Search

**Note:** Enter Partial Term & Asterisk (\*)

**Search Results**

Click  
**Go**

**Search Product**

| UPC         | Mfr. Catalog # | Manufacturer        | Item Name            | Item Description                 | Stk | Inv | Cust Rtnble | Vend Rtnble | Avb. Qty | UOM | Stock |
|-------------|----------------|---------------------|----------------------|----------------------------------|-----|-----|-------------|-------------|----------|-----|-------|
| 40001020003 | FAE20003       | Armada Fabrics, LLC | AF FAE20003          | AF FAE20003 FAE Short            | N   | Y   | N           | N           | 0        | YD  | Stock |
| 40001020004 | FAE20004       | Armada Fabrics, LLC | Silk Fabrics FAE 2-4 | AF FAE20004 Silk Fabrics FAE 2-4 | Y   | Y   | Y           | Y           | 0        | YD  | Stock |
| 40001020005 | FAE20005       | Armada Fabrics, LLC | AF FAE20005          | AF FAE20005 FAE20001             | N   | Y   | N           | Y           | 0        | YD  | Stock |
| 40001020008 | FAE20008       | Armada Fabrics, LLC | AF FAE20008          | FAE Short                        |     |     |             |             |          |     | Add   |


Search By: Product ID  Position To  Go Close Window

Select a Product

Select to  
Check  
Stock



# Create Quote




Ximple Solutions 2

**Product Navigator**

11/26/2012

11:07:34

User Guide



**Product Info**

**Product Description**

|                         |                            |                    |                     |                      |
|-------------------------|----------------------------|--------------------|---------------------|----------------------|
| <b>Name</b>             | Arctic Desk Lamp 10003-B35 | <b>Description</b> | Desk Lamp 10003-B35 |                      |
| <b>Type</b>             | Material                   | <b>Generic</b>     | No                  | <b>Serialized</b> No |
| <b>Inv Item</b>         | Yes                        | <b>Stock Item</b>  | Yes                 | <b>Lot</b> No        |
| <b>Obsolete</b>         | No                         | <b>Active</b>      | Yes                 | <b>Close Window</b>  |
| <b>Brand</b>            | Arctic                     |                    |                     |                      |
| <b>Manufacturer</b>     | Arctic Electric            |                    |                     |                      |
| <b>Product Line</b>     | Lamps >> Ceiling           |                    |                     |                      |
| <b>Long Description</b> | Arctic Lamp 1-3            |                    |                     |                      |

Stock

Pricing   Product   Association   Memo   Packaging   Vendor   Multimedia   Sales   Purchasing

| Branch / Warehouse          | Inventory            | Owner              | Avb. Qty | Ord Qty | BO Qty | Commit Qty |
|-----------------------------|----------------------|--------------------|----------|---------|--------|------------|
| MCK / MCK                   | Merchandise for Sale | Ximple Solutions 2 | 121      | 11      | 0      |            |
| MCK / MCK                   | Merchandise for Sale | Arctic Electric    | 0        | 11      | 0      |            |
| MCK / MCK                   | Merchandise for Sale | Ertime Alliance    | 0        | 11      | 0      |            |
| Gaithersburg / Gaithersburg | Merchandise for Sale | Ximple Solutions 2 | 100      | 0       | 0      |            |
| Ellicott / Ellicott         | Merchandise for Sale | Ximple Solutions 2 | 6        | 0       | 0      |            |
| BPK / BPK                   | Merchandise for Sale | Ximple Solutions 2 | 5        | 0       | 0      |            |
| Kesington / Kensington      | Merchandise for Sale | Ximple Solutions 2 | 2        | 5       | 0      |            |

Search Another

Save

Click **Save**



# Create Quote

| Line Detail ( Line # ) |   |                 |                |                          |                       |               |   |                                     |                          |                          |       |  |  |
|------------------------|---|-----------------|----------------|--------------------------|-----------------------|---------------|---|-------------------------------------|--------------------------|--------------------------|-------|--|--|
| Item                   | Avb Qty                                     | Qty             | DS/EBO Qty     | Price                    | Cust. Price           | GM% Disc%     | Need By                                     | Allow BO                            | EBO                      | Dir Ship                 |       |  |  |
| AE AE10002 Arctic Lamp | 11  | 1               |                | 53.34                    | EA                    |               | 04/16/2012                                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |       |  |  |
| Vendor                 |   |                 |                | Vend Item #              |                       | Mfr Catalog # |   |                                     |                          |                          |       |  |  |
| Pur. Price             |   |                 |                | Vend Quote #             |                       | Lot Item      |   |                                     |                          |                          |       |  |  |
| Cust Rtnble            | Y   | Sell Min Qty 0  | SPA Cost 40.00 | N/ 0.00                  | GM % 10.01            | /             | Min Sales Price 53.34                       | /                                   | Purch Min Qty            |                          |       |  |  |
| Vend Rtnble            | N   | Sell Incr Qty 0 | Force SPJ      | <input type="checkbox"/> | Sys. GM % 10.00       |               | Price Break                                 |                                     | Purch Incr Qty           |                          |       |  |  |
| Inventory Item         | N   | Stock Item N    | Active         | Y                        | Obsolete              | N             | Packaging                                   |                                     | Vend Prc Date            | 06/02/2011               |       |  |  |
| Vendor                 | Arctic Electric                             |                 | Next Pur. Date | 04/20/2012               |                       | Freight Term  | Vendor pays if total amount exceeds min. fr |                                     |                          |                          | 20.00 |  |  |
| Customer Comments      | 128characters remaining on your input limit |                 |                |                          |                       |               |   |                                     | Save New Line            |                          |       |  |  |
| Comments               | 255characters remaining on your input limit |                 |                |                          | Warehouse Instruction |               | 128characters remaining on your input limit |                                     |                          |                          |       |  |  |
| Vendor Comments        | 128characters remaining on your input limit |                 |                |                          | Internal Comments     |               | 128characters remaining on your input limit |                                     |                          |                          |       |  |  |
| << Back                |   |                 |                | Exit                     |                       |               |   | Delete Quote                        |                          |                          |       |  |  |

Click  
Save  
New Line



# Create Quote

Select to Move  
Down to Line Detail  
Portion of Form

Click  
Back

## Action Buttons

1. Exit
2. Approve
3. Delete
4. Back

04/16/2012  
07:51:42  
User Guide

**Quote - Items**

**Quote # 242**

|                  |                     |            |                 |                |        |
|------------------|---------------------|------------|-----------------|----------------|--------|
| Store            | MCK                 | Customer   | Custar Electric | Total Line     | 387.46 |
| Sales Person     | User Guide          | Need By    | 04/16/2012      | Total Discount | - 0.00 |
| Quote Date       | 04/16/2012          | Discount % | 0.00            | Total Tax      | 0.00   |
| Valid Until      |                     | Status     | WIP             | S & H          | 0.00   |
| Fulfillment Rule | Ship Complete Order | Job Name   |                 | Total          | 387.46 |

| Line# | Item<br>Cust Prod #         | Order<br>Qty | DS/EBO<br>Qty | Price | Cust<br>Price | Disc % | Allow<br>BO | EBO | Dir<br>Ship | SPJ | Cost*/SPA | GM % | DS/EBO<br>Cost*/SPA | DS/EBO<br>GM % | Total  | Lot? | Info | Asso<br>Prod | Lot<br>Prc |
|-------|-----------------------------|--------------|---------------|-------|---------------|--------|-------------|-----|-------------|-----|-----------|------|---------------------|----------------|--------|------|------|--------------|------------|
| 1     | AE AE10002 Arctic Lamp      | 1            | EA            | 0     | 53.34         | EA     | 0.00        | Yes |             |     | 48.0000   | EA   | 10.01               |                | 53.34  |      | Info | Add          |            |
| 2     | AE AE10005 AE 1-5<br>AE5    | 1            | EA            | 0     | 130.00        | EA     | 0.00        | Yes |             |     | 117.0000  | EA   | 10.00               |                | 130.00 |      | Info | Add          |            |
| 3     | AE AE10003 AE 1-3           | 1            | EA            | 0     | 111.12        | EA     | 0.00        | Yes |             |     | 100.0000  | EA   | 10.00               |                | 111.12 |      | Info | Add          |            |
| 4     | EA EA10001 EA 1-1<br>EA 1-1 | 1            | EA            | 0     | 62.71         | EA     | 0.00        | Yes |             |     | 50.0000   | EA   | 20.27               |                | 62.71  |      | Info |              | LPrC X     |
| 5     | EA EA10003 EA 1-3           | 1            | EA            | 0     | 30.29         | EA     | 0.00        | Yes |             |     | 25.0000   | EA   | 17.46               |                | 30.29  |      | Info |              | LPrC X     |

☐ Err Only ☐ Hide Cost ☐ Use Cust Part#
 Delete Line
New Prod
Cust Prt#
Upload
Position to Line#: 1 Go

|   |                                  |   |    |   |       |    |      |     |  |  |          |    |       |  |       |  |      |  |  |
|---|----------------------------------|---|----|---|-------|----|------|-----|--|--|----------|----|-------|--|-------|--|------|--|--|
| 1 | AE AE10002 Floor Lamp<br>EDITING | 1 | ea | 0 | 78.00 | ea | 0.00 | Yes |  |  | *40.0000 | ea | 48.72 |  | 78.00 |  | Info |  |  |
|---|----------------------------------|---|----|---|-------|----|------|-----|--|--|----------|----|-------|--|-------|--|------|--|--|

☐ Err Only ☐ Hide Cost ☐ Use Cust Part#
 Delete Line
New Prod
Position to Line#: 1 Go

**Line Detail ( Line # )**

| Item                 | Avb<br>Qty           | Qty                  | DS/EBO<br>Qty        | Price                | Cust.<br>Price       | GM%<br>Disc%         | Need By    | Allow<br>BO                         | EBO                      | Dir<br>Ship              |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------|-------------------------------------|--------------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 04/26/2011 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Vendor  Vend Item #  Mfr Catalog #   
 Pur. Price  Vend Quote #  Lot Item ☐

|                |                |              |                          |           |   |                 |   |
|----------------|----------------|--------------|--------------------------|-----------|---|-----------------|---|
| Cust Rtnble    | Sell Min Qty   | SPA Cost     | /                        | GM %      | / | Min Sales Price | / |
| Vend Rtnble    | Sell Incr Qty  | Force SPJ    | <input type="checkbox"/> | Sys. GM % |   | Price Break     |   |
| Inventory Item | Stock Item     | Active       |                          | Obsolete  |   | Packaging       |   |
| Vendor         | Next Pur. Date | Freight Term |                          |           |   |                 |   |


|                   |                      |
|-------------------|----------------------|
| Customer Comments | <input type="text"/> |
| Comments          | <input type="text"/> |
| Vendor Comments   | <input type="text"/> |

|                       |                      |
|-----------------------|----------------------|
| Warehouse Instruction | <input type="text"/> |
| Internal Comments     | <input type="text"/> |

<< Back
Exit
Approve Quote
Delete Quote



# Create Quote



**Ximple Solutions 2**  
**Quote**

04/16/2012  
07:55:41  
User Guide

| Shipping & Billing |            |       |                 |              |
|--------------------|------------|-------|-----------------|--------------|
| Quote #            | Quote Date | Store | Customer        | Sales Person |
| 242                | 04/16/2012 | MCK   | Custar Electric | User Guide   |

\*Need By

\*Valid Until

Job Name

Quote Placed By

\*Tax Exempt ☒ Yes ☐ No

Exemption Reason

\*Payment Terms

\*Payment Method

\*Billing Currency

\*Exchange Rate Final ☒ Yes ☐ No

Discount %

\*Fulfillment Rule

\*Shipping Method

\*Priority

Shipping Strategy

Bill To

Ship To

Shipping Instructions

Internal Comments

S & H

Blind Ship ☐

Shipping From

\*Communication Method ☒ Print ☐ Email ☐ Fax

Email

Fax

197characters remaining on your input limit

255characters remaining on your input limit

Click  
**Save & Exit**

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Save & Exit    Save & Continue >>    Reset    Cancel



# Approve Quote

**Xs** Ximple Solutions, LLC

Ximple Solutions  
**Quote List**

04/26/2011  
09:42:16  
User Guide

Quote List Customer Quotes

| Quote # | Type  | Store / Warehouse | Customer            | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status |
|---------|---|-------------------|---------------------|------------|--------------|---------------|-------------|----------|------------|--------|
| 168     | View<br>Edit<br>Add<br>Approve<br>Print<br>Print WO Price<br>Excel Report<br>Delete<br>Copy | ville             | Custar Electrics A1 | 04/26/2011 | 04/26/2011   |               | 04/27/2011  |          | User Guide | WIP    |

Back

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Select  
**Approve**

**Xs** Ximple Solutions, LLC

Ximple Solutions 2  
**Approve Quote**

04/16/2012  
07:56:04  
User Guide

Quote # 242

|                  |                     |            |                 |                |        |
|------------------|---------------------|------------|-----------------|----------------|--------|
| Store            | MCK                 | Customer   | Custar Electric | Total Line     | 387.48 |
| Sales Person     | User Guide          | Need By    | 04/16/2012      | Total Discount | - 0.00 |
| Quote Date       | 04/16/2012          | Discount % | 0.00            | Total Tax      | 0.00   |
| Valid Until      | 04/20/2012          | Status     | WIP             | S & H          | 0.00   |
| Fulfillment Rule | Ship Complete Order | Job Name   |                 | Total          | 387.48 |

Approved By User Guide

\*Approved Date 04/16/2012

\*Valid Until 04/20/2012

Print Quote ☒ Do not Print ☐ Print with Price ☐ Print without Price

Submit Reset Cancel

Click  
**Submit**



# Print Quote



Ximple Solutions

**Quote List**

12/03/2009  
12:40:02  
Jane Doe


| Quote # | Type   | Store / Warehouse | Customer         | Quote Date | Need By Date | Approved Date | Valid Until | Job Name             | Sales Rep. | Status   |
|---------|--|-------------------|------------------|------------|--------------|---------------|-------------|----------------------|------------|----------|
| 100     | View<br>Edit<br>Reject<br>Make Order<br><b>Print</b><br>Print WO Price<br>Copy | more              | Custar Electrics | 12/03/2009 | 12/03/2009   | 12/03/2009    | 12/15/2009  | Wiring of new school | Jane Doe   | Approved |

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Select '**Print**'  
or '**Print WO Price**'

-- Web Page Dialog
✕

Save a Copy
Print
Copy
Search
Select
Sign



**1 Main Street**  
Columbia, MD 21044  
Phone (301)345-6789

**Bid To**

Custar Electrics  
1111 Billing Way  
Kensington, MD 20895

### Customer Quote

Page 1

| Quote # | Quote Date | Valid Until / Status  |
|---------|------------|-----------------------|
| 108     | 12/08/2009 | 12/09/2009 / Approved |

| Store     | Store Phone # | SalesRep   |
|-----------|---------------|------------|
| Rockville |               | User Guide |


| Customer Acct # | Job Name | Ship Via / Shipping Method         |
|-----------------|----------|------------------------------------|
| 150             |          | United Postal Service / UPS Ground |

| LINE # | NAED VENDOR # | MFG-CATALOG<br>ITEM DESCRIPTION<br>CUSTOMER PART NUMBER                | STK<br>NSK | QTY | UM | UNIT PRICE | UM | DISC<br>% | EXT. PRICE |
|--------|---------------|--|------------|-----|----|------------|----|-----------|------------|
| 1      | 10001010002   | AE10002 - Arctic Electric, Inc.<br>Large Standing Arctic Lamp<br>10002 | STK        | 3   | ea | 66.25      | ea |           | 198.75     |

1 of 1
Navigation icons



# Make Order




**Ximple Solutions**  
**Quote List**

04/26/2011  
09:42:31  
User Guide

Quote List
Customer Quotes

| Quote # | Type   | Store / Warehouse | Customer           | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status   |
|---------|--|-------------------|--------------------|------------|--------------|---------------|-------------|----------|------------|----------|
| 168     | View<br>Edit<br>Reject<br><b>Make Order</b><br>Print<br>Print WO Price<br>Excel Report<br>Copy | ille              | Custar Electric A1 | 04/26/2011 | 04/26/2011   | 04/26/2011    | 04/27/2011  |          | User Guide | Approved |



**Ximple Solutions 2**  
**Convert Quote**

04/16/2012  
07:56:20  
User Guide

Quote # 242

|                  |                     |            |                 |                |        |
|------------------|---------------------|------------|-----------------|----------------|--------|
| Store            | MCK                 | Customer   | Custar Electric | Total Line     | 387.46 |
| Sales Person     | User Guide          | Need By    | 04/16/2012      | Total Discount | - 0.00 |
| Quote Date       | 04/16/2012          | Discount % | 0.00            | Total Tax      | 0.00   |
| Valid Until      | 04/20/2012          | Status     | Approved        | S & H          | 0.00   |
| Fulfillment Rule | Ship Complete Order | Job Name   |                 | Total          | 387.46 |

\*Order Date: 04/16/2012

Sales Person: User Guide

\*Commit Stock: ☒ Yes ☐ No

\*Order Type: ☒ Regular Order ☐ Counter Order

**Submit** **Reset** **Cancel**

| <input type="checkbox"/>            | Line# | Item                   | UOM | Order Qty | Price     | Total         | Lot Prc |
|-------------------------------------|-------|------------------------|-----|-----------|-----------|---------------|---------|
| <input type="checkbox"/>            | 1     | AE AE10002 Arctic Lamp | EA  | 1         | 53.34 EA  | 53.34         |         |
| <input checked="" type="checkbox"/> | 2     | AE AE10005 AE 1-5      | EA  | 1         | 130.00 EA | 130.00        |         |
| <input type="checkbox"/>            | 3     | AE AE10003 AE 1-3      | EA  | 1         | 111.12 EA | 111.12        |         |
| <input checked="" type="checkbox"/> | LOT   | Ertime Lamps           |     |           |           |               |         |
|                                     | 4     | EA EA10001 EA 1-1      | EA  | 1         | 62.71 EA  | 62.71         | Yes     |
|                                     | 5     | EA EA10003 EA 1-3      | EA  | 1         | 30.29 EA  | 30.29         | Yes     |
| <b>Total:</b>                       |       |                        |     |           |           | <b>387.46</b> |         |

Select  
**Make Order**

Click  
**Submit**



# Copy Quote

**Xs** Ximple Solutions, LLC

Ximple Solutions  
**Quote List**

08/11/2011  
15:50:35  
User Guide

Quote List Customer Quotes

| Quote # | Type | Store / Warehouse | Customer            | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status  |
|---------|------|-------------------|---------------------|------------|--------------|---------------|-------------|----------|------------|---------|
| 151     |      | Rockville         | Custar Electrics A1 | 03/29/2011 | 03/29/2011   | 03/29/2011    | 03/31/2011  |          | User Guide | Ordered |

View  
Print  
Add  
Print WO Price  
Excel Report  
Copy

Back

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Select  
**Copy**

**Xs** Ximple Solutions, LLC

Ximple Solutions  
**Copy Quote**

04/20/2011  
15:15:32  
User Guide

Copy Quote (P1300)

Copy From Quote # 151

\*Sales Person User Guide

\*Customer Custar Electrics A1 ☒ One Time Customer ☐

\*Store Rockville

\*Quote Date 04/20/2011

Keep Price ☒

Submit Reset Cancel

Click  
**Submit**



# Reject Quote

**Xs** Ximple Solutions 11/23/2009 11:29:49 User Guide

**Quote List**

| Quote # | Type | Store / Warehouse | Customer           | Quote Date | Need By Date | Approved Date | Valid Until | Job Name | Sales Rep. | Status   |
|---------|------|-------------------|--------------------|------------|--------------|---------------|-------------|----------|------------|----------|
| 97      |      | Rockville         | Custar Electronics | 11/23/2009 | 11/23/2009   | 11/23/2009    | 11/24/2009  |          | User Guide | Approved |

[Back](#)

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Site design by Ximple Corporation.

[View](#)  
[Edit](#)  
[Reject](#)  
[Make Order](#)  
[Print](#)  
[Print WVO Price](#)  
[Copy](#)

Select  
**Reject**

**Xs** Ximple Solutions 11/23/2009 11:37:03 User Guide

**Reject Quote**

Quote # 97

|                         |              |                   |                    |                       |        |
|-------------------------|--------------|-------------------|--------------------|-----------------------|--------|
| <b>Store</b>            | Rockville    | <b>Customer</b>   | Custar Electronics | <b>Total Line</b>     | 360.00 |
| <b>Sales Person</b>     | User Guide   | <b>Need By</b>    | 11/23/2009         | <b>Total Discount</b> | - 0.00 |
| <b>Quote Date</b>       | 11/23/2009   | <b>Discount %</b> | 0.00               | <b>Total Tax</b>      | 21.60  |
| <b>Valid Until</b>      | 11/24/2009   | <b>Status</b>     | Ordered            | <b>S &amp; H</b>      | 0.00   |
| <b>Fulfillment Rule</b> | Availability | <b>Job Name</b>   |                    | <b>Total</b>          | 381.60 |

**\*Reject Date**

**\*Rejected By**

**\*Reject Reason**

Click **Submit**



# Sales Quote - Certification

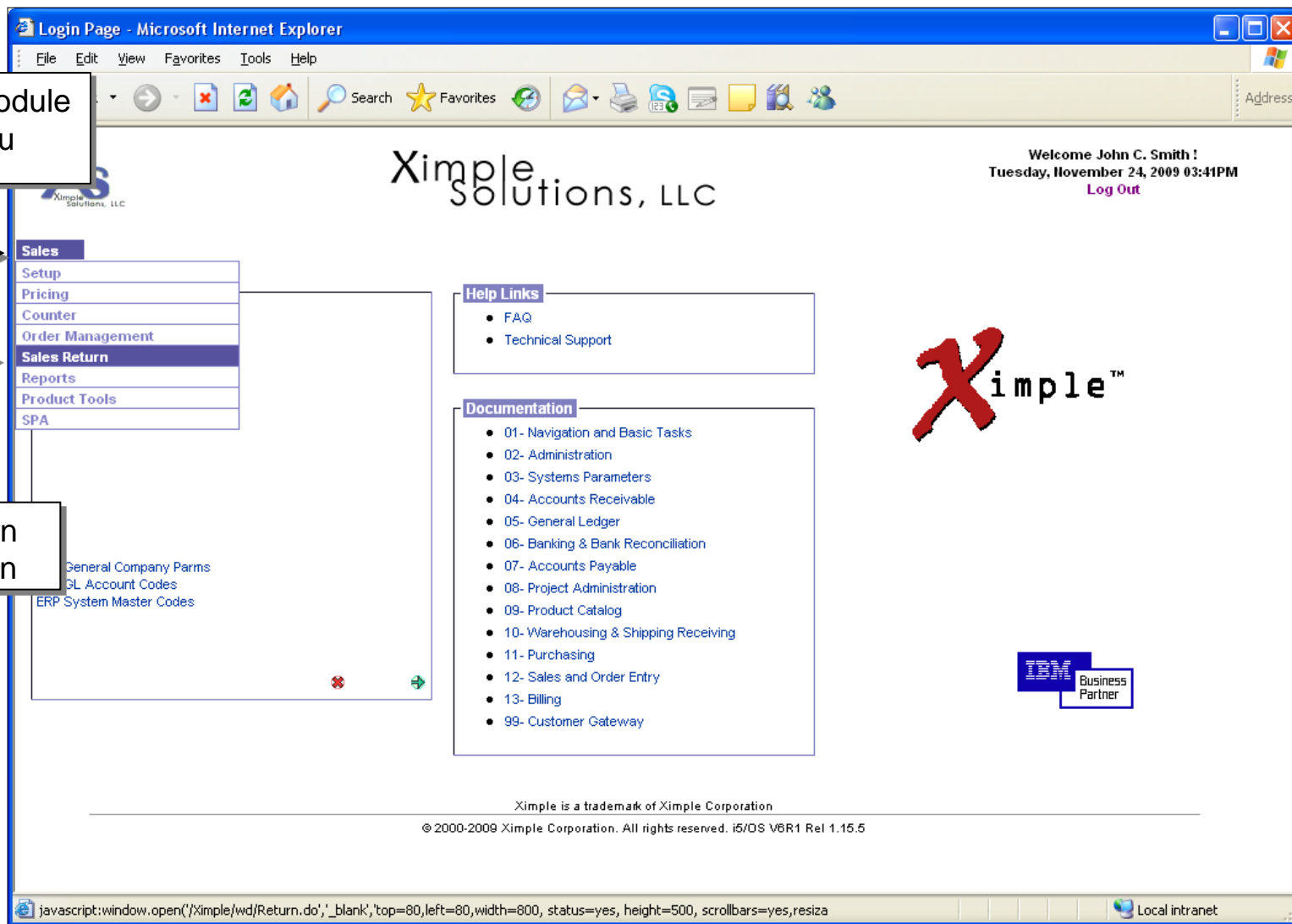
- 1. Search for quotes**
- 2. Enter Quote**
- 3. Make an order out of a quote**
  - Commit stock
  - Do not commit stock
- 4. Reject Quote**



# SO Returns

Sales Module  
Menu

Return  
Option



Login Page - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Search Favorites

Address

Ximple Solutions, LLC

Welcome John C. Smith!  
Tuesday, November 24, 2009 03:41PM  
[Log Out](#)

**Sales**

- Setup
- Pricing
- Counter
- Order Management
- Sales Return**
- Reports
- Product Tools
- SPA

General Company Params  
GL Account Codes  
ERP System Master Codes

**Help Links**

- FAQ
- Technical Support

**Documentation**

- 01- Navigation and Basic Tasks
- 02- Administration
- 03- Systems Parameters
- 04- Accounts Receivable
- 05- General Ledger
- 06- Banking & Bank Reconciliation
- 07- Accounts Payable
- 08- Project Administration
- 09- Product Catalog
- 10- Warehousing & Shipping Receiving
- 11- Purchasing
- 12- Sales and Order Entry
- 13- Billing
- 99- Customer Gateway

IBM Business Partner


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javascript:window.open('/Ximple/wd/Return.do','\_blank','top=80,left=80,width=800,status=yes,height=500,scrollbars=yes,resize')

Local intranet



# SO Returns



**Ximple Solutions**  
**New Sales Return**

11/24/2009  
15:59:30  
User Guide

| New Sales Return      |   |
|-----------------------|---|
| <b>Return Date</b>    | 11/24/2009  |
| <b>Store</b>          | Rockville <span style="float: right;">▼</span>  |
| <b>Invoice #</b>      | <input type="text"/> <input type="checkbox"/> No Invoice Return   |
| <b>Customer</b>       | <input type="text"/> <span style="float: right;">v</span>   |
| <b>Invoice Lookup</b> | <b>Order #</b> <input type="text"/> <span style="color: red; font-weight: bold;">OR</span> <input type="text"/> <span style="float: right;">v</span> <span style="border: 1px solid black; padding: 2px 5px;">Search</span> |
| <b>Require Pickup</b> | <input type="checkbox"/>  |


Continue
Reset
Lookup

Click **Lookup**



# SO Returns

Enter Search  
Criteria



**Ximple Solutions**  
**Sales Return Lookup**

11/24/2009  
16:00:30  
User Guide

| Sales Return Lookup  |   |   |                                |
|--|---|---|--------------------------------|
| Return #   | <input type="text"/>  | OR  | Invoice # <input type="text"/> |
|  |   | OR  | Order # <input type="text"/>   |
| Warehouse  | <div>Rockville <span style="float: right;">▼</span></div>   |   |                                |
| Customer   | <input type="text"/> <span style="float: right;"> <input type="checkbox"/> One Time Customer         </span>          |   |                                |
| Date Range   | <div>11/01/2009 <span style="float: right;">▼</span></div> <div>11/24/2009 <span style="float: right;">▼</span></div> |   |                                |
| Return Type  | <div>All <span style="float: right;">▼</span></div>   |   |                                |
| Return Status  | <div>All <span style="float: right;">▼</span></div>   |   |                                |
| <div style="background-color: #4a5568; color: white; padding: 5px; display: inline-block;">Add New</div> |   | <div style="background-color: #4a5568; color: white; padding: 5px; display: inline-block;">Lookup</div> |                                |

Click to Enter  
Return

Click **Lookup**



# SO Returns

Popup  
Menu



Ximple Solutions

Sales Return List

11/24/2009

16:00:35

User Guide

| Sales Return List |                     |            |           |         |           |                  |          |            |                |
|-------------------|---------------------|------------|-----------|---------|-----------|------------------|----------|------------|----------------|
| Return #          | Type                | Date       | Invoice # | Order # | Store     | Customer         | Dir Ship | Req Pickup | Status         |
| 136               | View                | 11/18/2009 | 2638      | 524     | Rockville | Custar Electrics |          | Yes        | Pending Pickup |
| 138               | Edit                | 11/24/2009 | 2649      | 550     | Rockville | Custar Electrics |          | Yes        | Pending Pickup |
|                   | Receive             |            |           |         |           |                  |          |            |                |
|                   | Print Returned Item |            |           |         |           |                  |          |            |                |
| Ad                |                     | Back       |           |         |           |                  |          |            |                |

Click  
**Add New**

## Popup Menu:

**Edit:** Edit return & enter received shipped qty.

**View:** View return's information

**Receive:** Receive return

**Delete:** Delete return

**Refund:** Refund customer

**Print Returned Item:** Print label of items returned

**Receipt:** Print receipt of return (Generates pdf file)



# **SO Returns – Types & Steps**

## **w/ Invoice & No Pickup Required**

1. Enter Return
2. Receive Items
3. Refund Customer

## **w/out Invoice & No Pickup Required**

1. Enter Return
  - Add Items to Return
2. Receive Items
3. Refund Customer


## **Pickup Required**

1. Enter Return
2. Schedule Pickup
3. Edit Return (once trip closes  
you need to verify qty  
received)
4. Receive Items
5. Refund Customer



# SO Returns (No Pickup Required)

Enter Return  
Information



Ximple Solutions  
**New Sales Return**


11/01/2012  
12:55:01  
User Guide

| New Sales Return |  |
|------------------|--|
| Return Date      | 11/01/2012   |
| Store            | Rockville  |
| Invoice #        | 16173 <input type="checkbox"/> No Invoice Return   |
| Customer         | <input type="text"/> v   |
| Invoice Lookup   | Order # <input type="text"/> OR Receipt # <input type="text"/> OR<br>Item <input type="text"/> v <input type="button" value="Search"/> |
| Require Pickup   | <input type="checkbox"/>   |

Click  
**Continue**



# SO Returns (No Pickup Required)



**Ximple Solutions, LLC**

Ximple Solutions

**Edit Sales Return**

11/01/2012

12:56:27

[User Guide](#)

| Edit Return |            |           |                    |         |        |
|-------------|------------|-----------|--------------------|---------|--------|
| Return #    | Date       | Store     | Customer           | Type    | Status |
| 390         | 11/01/2012 | Rockville | Custar "Electrics" | Regular | WIP    |

Pickup/S&H Charge

Restocking Fee % (Stock)

Restocking Fee % (Non-Stock)

Price Return Receipt

☒ Yes
 ☐ No

Comments

255characters remaining on your input limit

Save & Continue >>


Reset

Cancel

Click  
**Save & Continue**



# SO Returns (No Pickup Required – Enter Qty)



**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
12:58:42  
User Guide

Return # 390

|                |            |                  |                      |                |        |
|----------------|------------|------------------|----------------------|----------------|--------|
| Return Date    | 11/01/2012 | Customer         | Custar "Electrics"   | Total Line     | 0.00   |
| Return Type    | Regular    | Order #          | 2170                 | Restocking Fee | 0.00 - |
| Require Pickup |            | Invoice # - Type | 16173 - Cash Invoice | Total Tax      | 0.00   |
| Direct Ship    |            | Vendor           |                      | Pickup Charge  | 0.00 - |
| Return Status  | WIP        | Job Name         |                      | Total          | 0.00   |

| Invoice |                       |             |     |              |            |             |             |         | Return     |           |          |                |            | Edit | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 0            | 62.50 ea   | No          | No          |         | 0          | 0         | 0        | 0.00           | 0.00       | Add  |        |

<< Back
Receive
Exit

Click **Add**



# SO Returns (No Pickup Required – Enter Qty)

Return Qty = Dmg Qty + Dfc Qty

| Product               | Invoiced Qty | Avb Qty | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Stock Item | Lot Prc | Min Qty/ Incr Qty |
|-----------------------|--------------|---------|--------------|------------|-------------|-------------|------------|---------|-------------------|
| AE AE10003 Floor Lamp | 2            | 1       | 0            | 62.50 / ea | No          | No          | Yes        |         | /                 |


  

|                  |   |                         |                                     |
|------------------|---|-------------------------|-------------------------------------|
| Return Qty       | <input type="text" value="1"/>            | Exchange Qty            | <input type="text"/>                |
| Damaged Qty      | <input type="text" value="1"/>            | Defective Qty           | <input type="text"/>                |
| Restocking Fee % | <input type="text" value="0.00"/>         |                         |                                     |
| *Reason          | <input type="text"/>                      | Qty Consolidate For Prt | <input checked="" type="checkbox"/> |
| *Comments        | <input type="text" value="Damaged Item"/> |                         |                                     |

Click **Save**



# SO Returns (No Pickup Required – Receive Item)



Ximple Solutions

**Sales Return - Items**

11/01/2012  
13:01:59  
User Guide

Return # 390

|                        |                                       |                       |
|------------------------|---------------------------------------|-----------------------|
| Return Date 11/01/2012 | Customer Custar "Electrics"           | Total Line 62.50      |
| Return Type Regular    | Order # 2170                          | Restocking Fee 0.00 - |
| Require Pickup         | Invoice # - Type 16173 - Cash Invoice | Total Tax 3.75        |
| Direct Ship            | Vendor                                | Pickup Charge 0.00 -  |
| Return Status WIP      | Job Name                              | Total 66.25           |

| Invoice |                       |             |     |              |            |             |             |         | Return     |           |          |                |            | Edit | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 0            | 62.50 ea   | No          | No          |         | 1          | 0         | 1        | 0.00           | 62.50      | Edit | Delete |

<< Back
Receive
Exit

Click **Receive**

**IMPORTANT:** Once you 'RECEIVE' you CANNOT DELETE the return. The items are back in stock.



# SO Returns (No Pickup Required - Refund)

**Ximple Solutions**  
**Sales Return List**

11/01/2012  
13:03:04  
User Guide

**Sales Return List** Customer Return Request

| Return # | Type | Date       | Invoice # | Order # | Store     | Customer           | Dir Ship | Req Pickup | Status   | Employee Name |
|----------|------|------------|-----------|---------|-----------|--------------------|----------|------------|----------|---------------|
| 390      |      | 11/01/2012 | 16173     | 2170    | Rockville | Custar "Electrics" |          |            | Received | User Guide    |

View  
Refund  
Print Returned Item

Back

Click **Refund**

Click **Submit**

**Ximple Solutions**  
**Sales Return Refund**

11/01/2012  
13:04:03  
User Guide

| Return # | Type    | Store     | Customer           | Invoice              | Order # | Refund Amt      |
|----------|---------|-----------|--------------------|----------------------|---------|-----------------|
| 390      | Regular | Rockville | Custar "Electrics" | 16173 - Cash Invoice | 2170    | 66.25 US Dollar |

Refund Method ☐ Cash ☐ Check ☒ Credit ☐ Credit Card

Cash Desk

Check Pay To

Mailing Addr.  V

Cash Comment

Credit Card #

Expiration (MM/YYYY)

Card Holder Name  Security Code


Address

Zip Code

Reference



# SO Returns (No Pickup Required - Refund)



**3831 Farragut Avenue**  
**Kensington, MD 20895**  
**Phone (301)345-6789**

## Customer Return

Page 1

|                 |              |                    |                        |
|-----------------|--------------|--------------------|------------------------|
| Return #        | Date         | Return To Store    | Type                   |
| 390             | 11/01/2012   | Rockville          | Regular                |
| Invoice #       | Invoice Date | Order # / Trip #   | Sold At Store by       |
| 16173           | 11/01/2012   | 2170 /             | Rockville - User Guide |
| Customer Acct # | Customer PO  | Customer           |                        |
| 150             |              | Custar "Electrics" |                        |
| Prepared By     | Received By  | Refund Method      | Order Disc %           |
| User Guide      | User Guide   | Credit             |                        |

**Billed To**

Custar "Electrics"  
GABBY JONES  
1111 Test Bill Way  
Kensington, MD 20895

**Shipped To**

Custar "Electrics"

| LINE # | UPC         | MFG-CATALOG<br>ITEM DESCRIPTION<br>CUSTOMER PART NUMBER<br>COMMENT | RTRND | EVEN<br>XCHGE | DMG | DEF | UM   | UNIT<br>PRICE | UM   | DISC<br>% | EXT.<br>AMOUNT | RESTK<br>FEE % |
|--------|-------------|--|-------|---------------|-----|-----|------|---------------|------|-----------|----------------|----------------|
| 1      | 10001010003 | AE10003 - Arcotic Electric, Inc.<br>Floor Lamp<br>Damaged Item     | 1     | 0             | 1   | 0   | Each | 62.50         | Each |           | 62.50          |                |

Sub Total 62.50

Restocking Charge 0.00 -

Sales Tax 6.0000 % 3.75

Pickup/S&H Charge 0.00

Refund Total -66.25 US

Conditions Of Sale



# SO Returns (No Invoice)

Example: for Free Form Sales returns

Only for Regular  
Customers – No  
One Time  
Customers



Ximple Solutions  
**New Sales Return**

11/01/2012  
14:51:40  
User Guide

**New Sales Return**

Return Date 11/01/2012

Store Rockville

Invoice # ☐ No Invoice Return

Customer Custar "Electrics" v

Invoice Lookup Order #  OR Receipt #  OR  
Item  v Search


Require Pickup ☐

Continue >> Reset Back To Lookup

Click  
**Continue**



# SO Returns (No Invoice)



**Ximple Solutions**  
**Edit Sales Return**

11/01/2012  
15:00:50  
User Guide

| Edit Return |            |           |                    |        |        |
|-------------|------------|-----------|--------------------|--------|--------|
| Return #    | Date       | Store     | Customer           | Type   | Status |
| 391         | 11/01/2012 | Rockville | Custar "Electrics" | No Inv | WIP    |

|                              |  |
|------------------------------|--|
| Pickup/S&H Charge            | <input type="text" value="0.00"/>                                      |
| Restocking Fee % (Stock)     | <input type="text" value="5"/>   |
| Restocking Fee % (Non-Stock) | <input type="text" value="5"/>   |
| Price Return Receipt         | <input checked="" type="radio"/> Yes <input type="radio"/> No          |
| Comments                     | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> |

255characters remaining on your input limit

Save & Continue >>


Reset

Cancel

Click  
**Save & Continue**



# SO Returns (No Invoice – Enter Qty)




**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
15:01:12  
User Guide

Return # 391

|                |            |                  |                    |                |        |
|----------------|------------|------------------|--------------------|----------------|--------|
| Return Date    | 11/01/2012 | Customer         | Custar "Electrics" | Total Line     | 0.00   |
| Return Type    | No Inv     | Order #          |                    | Restocking Fee | 0.00 - |
| Require Pickup |            | Invoice # - Type |                    | Total Tax      | 0.00   |
| Direct Ship    |            | Vendor           |                    | Pickup Charge  | 0.00 - |
| Return Status  | WIP        | Job Name         |                    | Total          | 0.00   |

| Line #   | Item | Qty UOM | Return Qty | Exchg Qty | Recv Qty | Unit Price | Cust Price | Restk Charge % | Return Amt | Edit | Delete |
|--|------|---------|------------|-----------|----------|------------|------------|----------------|------------|------|--------|
|  No data was found. |      |         |            |           |          |            |            |                |            |      |        |

Add New
<< Back
Exit

Click **Add New**



# SO Returns (No Invoice – Enter Qty)

Return Qty = Dmg Qty + Dfc Qty

| Return Item      |                       |                                     |                                  |                                       |                       |
|------------------|-----------------------|-------------------------------------|----------------------------------|---------------------------------------|-----------------------|
| *Item            | AE AE10003 Floor Lamp | <input type="button" value="V"/>    | Each                             | Avb Qty: 1                            | Min Qty:    Incr Qty: |
| *Unit Price      | 0.46                  | ea                                  | <input type="button" value="V"/> | <input type="checkbox"/> Custom Price |                       |
| Return Qty       | 2                     | Exchange Qty                        |                                  | <input type="text"/>                  |                       |
| Damaged Qty      | <input type="text"/>  | Defective Qty                       |                                  | <input type="text"/>                  |                       |
| Restocking Fee % | 5.00                  |                                     |                                  |                                       |                       |
| *Reason          | Default               | Qty Consolidate For Prt             |                                  | <input checked="" type="checkbox"/>   |                       |
| *Comments        | Item not needed       |                                     |                                  |                                       |                       |
|                  |                       | <input type="button" value="Save"/> |                                  | <input type="button" value="Cancel"/> |                       |

Click  
**Save**

**Note:** Exchanges can only be done for returns that DO NOT require Pick-up.

**Return Qty = Dmg Qty + Dfc Qty**

or


**Exchange Qty = Dmg Qty + Dfc Qty**

**Return Qty DOES NOT include Exchange Qty**

**Qty at Counter = Return Qty + Exchange Qty**



# SO Returns (No Invoice – Receive Item)



**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
15:02:19  
User Guide

Return # 391

|                |            |                  |                    |                |        |
|----------------|------------|------------------|--------------------|----------------|--------|
| Return Date    | 11/01/2012 | Customer         | Custar "Electrics" | Total Line     | 0.92   |
| Return Type    | No Inv     | Order #          |                    | Restocking Fee | 0.05 - |
| Require Pickup |            | Invoice # - Type |                    | Total Tax      | 0.06   |
| Direct Ship    |            | Vendor           |                    | Pickup Charge  | 0.00 - |
| Return Status  | WIP        | Job Name         |                    | Total          | 0.93   |

| Line # | Item                  | Qty UOM | Return Qty | Exchg Qty | Recv Qty | Unit Price | Cust Price | Restk Charge % | Return Amt | Edit | Delete |
|--------|-----------------------|---------|------------|-----------|----------|------------|------------|----------------|------------|------|--------|
| 1      | AE AE10003 Floor Lamp | ea      | 2          | 0         | 2        | 0.4600 ea  |            | 5.00           | 0.92       | Edit | Delete |

Add New
<< Back
Receive
Exit

Click **Receive**



# SO Returns (No Invoice - Refund)

**Xs** Ximple Solutions, LLC

**Ximple Solutions**  
**Sales Return List**

11/01/2012  
13:03:04  
User Guide

**Sales Return List** Customer Return Request

| Return # | Type | Date       | Invoice # | Order # | Store     | Customer           | Dir Ship | Req Pickup | Status   | Employee Name |
|----------|------|------------|-----------|---------|-----------|--------------------|----------|------------|----------|---------------|
| 390      |      | 11/01/2012 | 16173     | 2170    | Rockville | Custar "Electrics" |          |            | Received | User Guide    |

View  
Refund  
Print Returned Item

Back

Click **Refund**

**Xs** Ximple Solutions, LLC

**Ximple Solutions**  
**Sales Return Refund**

11/01/2012  
15:02:50  
User Guide

| Return # | Type   | Store     | Customer           | Invoice | Order # | Refund Amt     |
|----------|--------|-----------|--------------------|---------|---------|----------------|
| 391      | No Inv | Rockville | Custar "Electrics" |         |         | 0.93 US Dollar |

Refund Method ☒ Cash ☐ Check ☐ Credit

Cash Desk

Check Pay To

Mailing Addr.


Cash Comment

Submit Cancel

Click **Submit**



# SO Returns (Requires Pickup)



Ximple Solutions  
**New Sales Return**

11/01/2012  
15:10:27  
User Guide

New Sales Return

Return Date11/01/2012

StoreRockville

Invoice #1673
☐ No Invoice Return

Customer

Invoice Lookup

Order #
OR
Receipt #
OR


Item

Require Pickup☒

Click  
**Continue**



# SO Returns (Requires Pickup)



**Ximple Solutions**  
**Edit Sales Return**

11/01/2012  
15:16:05  
User Guide

| Edit Return |            |           |                    |         |        |
|-------------|------------|-----------|--------------------|---------|--------|
| Return #    | Date       | Store     | Customer           | Type    | Status |
| 392         | 11/01/2012 | Rockville | Custar "Electrics" | Regular | WIP    |


Pickup/S&H Charge

15

Charge Customer Freight: 2.00


\*Pickup Date

11/01/2012




\*Pickup Address

156 Deer Drive, Kensington, MD 20895



Pickup Instr.



255 characters remaining on your input limit

Restocking Fee % (Stock)

0.00


Restocking Fee % (Non-Stock)

0.00

Price Return Receipt

☒ Yes
 ☐ No

Comments



255 characters remaining on your input limit

Save & Continue >>


Reset

Cancel

Click  
**Save & Continue**



# SO Returns (Requires Pickup - Enter Items)



**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
15:16:36  
User Guide

Return # 392

|                        |                                       |  |
|------------------------|---------------------------------------|--|
| Return Date 11/01/2012 | Customer Custar "Electrics"           |  |
| Return Type Regular    | Order # 2170                          |  |
| Require Pickup Yes     | Invoice # - Type 16173 - Cash Invoice |  |
| Direct Ship            | Vendor                                |  |
| Return Status WIP      | Job Name                              |  |

|                           |               |
|---------------------------|---------------|
| Total Line Restocking Fee |               |
| Total Tax                 | 0.00          |
| Pickup Charge             | 15.00 -       |
| <b>Total</b>              | <b>-15.00</b> |

| Invoice |                       |             |     |              |            |             |             |         |            | Return    |          |                |            | Edit | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 1            | 62.50 ea   | No          | No          |         | 0          | 0         | 0        | 0.00           | 0.00       | Add  |        |

<< Back
Schedule Pickup
Exit

Click **Add**

| Product               | Invoiced Qty | Avb Qty | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Stock Item | Lot Prc | Min Qty/ Incr Qty |
|-----------------------|--------------|---------|--------------|------------|-------------|-------------|------------|---------|-------------------|
| AE AE10003 Floor Lamp | 2            | 3       | 1            | 62.50 / ea | No          | No          | Yes        |         | /                 |


|                  |                |                         |                                     |
|------------------|----------------|-------------------------|-------------------------------------|
| Return Qty       | 1              |                         |                                     |
| Damaged Qty      |                | Defective Qty           |                                     |
| Restocking Fee % | 0.00           |                         |                                     |
| Reason           | Default        | Qty Consolidate For Prc | <input checked="" type="checkbox"/> |
| *Comments        | Returning item |                         |                                     |

Save
Cancel

Click **Save**



# SO Returns (Requires Pickup – Schedule Pickup)



**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
15:17:13  
User Guide

Return # 392

|                |            |                  |                      |                |         |
|----------------|------------|------------------|----------------------|----------------|---------|
| Return Date    | 11/01/2012 | Customer         | Custar "Electrics"   | Total Line     | 62.50   |
| Return Type    | Regular    | Order #          | 2170                 | Restocking Fee | 0.00 -  |
| Require Pickup | Yes        | Invoice # - Type | 16173 - Cash Invoice | Total Tax      | 3.75    |
| Direct Ship    |            | Vendor           |                      | Pickup Charge  | 15.00 - |
| Return Status  | WIP        | Job Name         |                      | Total          | 51.25   |

| Invoice |                       |             |     |              |            |             |             |         |            | Return    |          |                |            |      | Edit   | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 1            | 62.50 ea   | No          | No          |         | 1          | 0         | 0        | 0.00           | 62.50      | Edit | Delete |        |

<< Back
Schedule Pickup
Exit

Click  
**Schedule Pickup**

You continue the return process AFTER Item is in the WH (pickup has occurred and Trip has been closed)



# SO Returns (Requires Pickup – Receive Items)



Ximple Solutions

**Sales Return List**

11/01/2012

15:17:23

User Guide

Sales Return List

Customer Return Request


| Sales Return List |         |            |           |         |           |                    |          |            |                |               |
|-------------------|---------|------------|-----------|---------|-----------|--------------------|----------|------------|----------------|---------------|
| Return #          | Type    | Date       | Invoice # | Order # | Store     | Customer           | Dir Ship | Req Pickup | Status         | Employee Name |
| 390               | Regular | 11/01/2012 | 16173     | 2170    | Rockville | Custar "Electrics" |          |            | Closed         | User Guide    |
| 392               |         | 11/01/2012 | 16173     | 2170    | Rockville | Custar "Electrics" |          | Yes        | Pending Pickup | User Guide    |

[View](#)  
[Edit](#)  
[Receive](#)  
[Print Returned Item](#)

[Back](#)

Select  
**Edit**

Click **Save & Continue**



Ximple Solutions

**Edit Sales Return**

11/01/2012

15:17:46

User Guide

| Edit Return |            |           |                    |         |                |
|-------------|------------|-----------|--------------------|---------|----------------|
| Return #    | Date       | Store     | Customer           | Type    | Status         |
| 392         | 11/01/2012 | Rockville | Custar "Electrics" | Regular | Pending Pickup |


Pickup/S&H Charge

15.00

Charge Customer Freight: 2.00


\*Pickup Date

11/01/2012



\*Pickup Address

156 Deer Drive, Kensington, Montgomery, MD, 20895



Pickup Instr.

255characters remaining on your input limit

Restocking Fee % (Stock)

0.00

Restocking Fee % (Non-Stock)

0.00

Price Return Receipt

☒ Yes
 ☐ No

Comments

255characters remaining on your input limit


Save & Continue >>

Reset

Cancel



# SO Returns (Requires Pickup - Receive Items)



**Simple Solutions**  
**Sales Return - Items**

11/01/2012  
15:00  
User C

Select  
**Edit**

Return # 392

|                |                |                  |                      |                |         |
|----------------|----------------|------------------|----------------------|----------------|---------|
| Return Date    | 11/01/2012     | Customer         | Custar "Electrics"   | Total Line     | 62.50   |
| Return Type    | Regular        | Order #          | 2170                 | Restocking Fee | 0.00 -  |
| Require Pickup | Yes            | Invoice # - Type | 16173 - Cash Invoice | Total Tax      | 3.75    |
| Direct Ship    |                | Vendor           |                      | Pickup Charge  | 15.00 - |
| Return Status  | Pending Pickup | Job Name         |                      | Total          | 51.25   |

| Invoice |                       |             |     |              |            |             |             |         | Return     |           |          |                |            | Edit | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 1            | 62.50 ea   | No          | No          |         | 1          | 0         | 0        | 0.00           | 62.50      | Edit |        |

<< Back
Receive
Exit

Enter  
Received  
Qty

Click **Save**


| Product               | Invoiced Qty | Avb Qty | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Stock Item | Lot Prc | Min Qty/ Incr Qty |
|-----------------------|--------------|---------|--------------|------------|-------------|-------------|------------|---------|-------------------|
| AE AE10003 Floor Lamp | 2            | 3       | 1            | 62.50 / ea | No          | No          | Yes        |         | /                 |

|                  |  |                         |                                     |
|------------------|--|-------------------------|-------------------------------------|
| Return Qty       | <input type="text" value="1"/>             |                         |                                     |
| Damaged Qty      | <input type="text" value="0"/>             | Defective Qty           | <input type="text" value="0"/>      |
| Received Qty     | <input type="text" value="1"/>             |                         |                                     |
| Restocking Fee % | <input type="text" value="0.00"/>          |                         |                                     |
| *Reason          | Default                                    | Qty Consolidate For Prt | <input checked="" type="checkbox"/> |
| *Comments        | <input type="text" value="Returned item"/> |                         |                                     |

Save
Cancel



# SO Returns (Requires Pickup – Receive Items)



**Ximple Solutions**  
**Sales Return - Items**

11/01/2012  
16:00:53  
User Guide

Return # 393

|                |                |                  |                      |  |                |         |
|----------------|----------------|------------------|----------------------|--|----------------|---------|
| Return Date    | 11/01/2012     | Customer         | Custar "Electrics"   |  | Total Line     | 62.50   |
| Return Type    | Regular        | Order #          | 2170                 |  | Restocking Fee | 0.00 -  |
| Require Pickup | Yes            | Invoice # - Type | 16173 - Cash Invoice |  | Total Tax      | 3.75    |
| Direct Ship    |                | Vendor           |                      |  | Pickup Charge  | 15.00 - |
| Return Status  | Pending Pickup | Job Name         |                      |  | Total          | 51.25   |

| Invoice |                       |             |     |              |            |             |             |         | Return     |           |          |                |            | Edit | Delete |
|---------|-----------------------|-------------|-----|--------------|------------|-------------|-------------|---------|------------|-----------|----------|----------------|------------|------|--------|
| Line #  | Item                  | Invoice Qty | UOM | Returned Qty | Unit Price | Cust Rtnble | Vend Rtnble | Lot Prc | Return Qty | Exchg Qty | Recv Qty | Restk Charge % | Return Amt |      |        |
| 1       | AE AE10003 Floor Lamp | 2           | ea  | 1            | 62.50 ea   | No          | No          |         | 1          | 0         | 1        | 0.00           | 62.50      |      |        |

<< Back
Receive
Exit

Click  
**Receive**



# SO Returns (Requires Pickup - Refund)



Ximple Solutions

**Sales Return List**

11/01/2012

16:17:21

User Guide

Sales Return List
Customer Return Request


| Sales Return List |      |            |           |         |           |                    |          |            |          |               |
|-------------------|------|------------|-----------|---------|-----------|--------------------|----------|------------|----------|---------------|
| Return #          | Type | Date       | Invoice # | Order # | Store     | Customer           | Dir Ship | Req Pickup | Status   | Employee Name |
| 393               |      | 11/01/2012 | 16173     | 2170    | Rockville | Custar "Electrics" |          | Yes        | Received | User Guide    |

[View](#)  
[Refund](#)  
[Print Returned Item](#)

[Back](#)

Select  
**Refund**

Click  
**Submit**



Ximple Solutions

**Sales Return Refund**

11/01/2012

16:17:25

User Guide

| Sales Return Refund |         |           |                    |                      |         |                 |
|---------------------|---------|-----------|--------------------|----------------------|---------|-----------------|
| Return #            | Type    | Store     | Customer           | Invoice              | Order # | Refund Amt      |
| 393                 | Regular | Rockville | Custar "Electrics" | 16173 - Cash Invoice | 2170    | 51.25 US Dollar |

**Refund Method**

☐ Cash
 ☐ Check
 ☒ Credit
 ☐ Credit Card

**Cash Desk**

**Check Pay To**

**Mailing Addr.**

V

**Cash Comment**

**Credit Card #**

**Expiration (MM/YYYY)**

**Card Holder Name**

**Security Code**

**Address**

**Zip Code**

**Reference**

Swipe Card


Clear Card

Submit

Cancel



# SO Returns (Requires Pickup - Refund)



**3831 Farragut Avenue**  
**Kensington, MD 20895**  
**Phone (301)345-6789**

## Customer Return

Page 1

|                 |              |                    |                        |
|-----------------|--------------|--------------------|------------------------|
| Return #        | Date         | Return To Store    | Type                   |
| 393             | 11/01/2012   | Rockville          | Regular                |
| Invoice #       | Invoice Date | Order # / Trip #   | Sold At Store by       |
| 16173           | 11/01/2012   | 2170 /             | Rockville - User Guide |
| Customer Acct # | Customer PO  | Customer           |                        |
| 150             |              | Custar "Electrics" |                        |
| Prepared By     | Received By  | Refund Method      | Order Disc %           |
| User Guide      | User Guide   | Credit             |                        |

**Billed To**

Custar "Electrics"  
GABBY JONES  
1111 Test Bill Way  
Kensington, MD 20895

**Shipped To**

Custar "Electrics"

| LINE # | UPC         | MFG-CATALOG<br>ITEM DESCRIPTION<br>CUSTOMER PART NUMBER<br>COMMENT | RTRND | EVEN<br>XCHGE | DMG | DEF | UM   | UNIT<br>PRICE | UM   | DISC<br>% | EXT.<br>AMOUNT | RESTK<br>FEE % |
|--------|-------------|--|-------|---------------|-----|-----|------|---------------|------|-----------|----------------|----------------|
| 1      | 10001010003 | AE10003 - Arctic Electric, Inc.<br>Floor Lamp<br>Returned item     | 1     | 0             | 0   | 0   | Each | 62.50         | Each |           | 62.50          |                |

Sub Total 62.50

Restocking Charge 0.00 -

Sales Tax 6.0000 % 3.75

Pickup/S&H Charge 15.00

**Refund Total -51.25 US**

Conditions Of Sale

Click to  
Print

Return  
Information



# SO Returns – Extras (Exchange Item)

## When Adding Items to the Return:

| Return Item             |                                     |               |                                       |
|-------------------------|-------------------------------------|---------------|---------------------------------------|
| Item                    | AE50001 Arctic Heater - 5-1 AE      |               | V Each                                |
| Unit Price              | 520.00 ea                           | V             | <input type="checkbox"/> Custom Price |
| Return Qty              |                                     | Exchange Qty  | 1                                     |
| Damaged Qty             | 1                                   | Defective Qty |                                       |
| Restocking Fee %        | 0.00                                |               |                                       |
| Reason                  | Damaged                             |               |                                       |
| Qty Consolidate For Prt | <input checked="" type="checkbox"/> |               |                                       |
| Comments                |                                     |               |                                       |
|                         |                                     | Save          | Cancel                                |

Click  
Save

**Note:** Exchanges can only be done for returns that DO NOT require Pick-up.

**Return Qty = Dmg Qty + Dfc Qty**

or


**Exchange Qty = Dmg Qty + Dfc Qty**

**Return Qty DOES NOT include Exchange Qty**

**Qty at Counter = Return Qty + Exchange Qty**



# SO Returns – Extras (Exchange Item)



Ximple Solutions  
**Sales Return - Items**

01/24/2010  
16:50:32  
User Guide

Return # 155

|                |            |                  |                    |                |        |
|----------------|------------|------------------|--------------------|----------------|--------|
| Return Date    | 01/24/2010 | Customer         | Custar Electronics | Total Line     | 0.00   |
| Return Type    | No Inv     | Order #          |                    | Restocking Fee | 0.00 - |
| Require Pickup |            | Invoice # - Type |                    | Total Tax      | 0.00   |
| Direct Ship    |            | Vendor           |                    | Pickup Charge  | 0.00 - |
| Return Status  | VMP        |                  |                    | Total          | 0.00   |

| Line # | Item                           | Qty | UOM | Return Qty | Exchg Qty | Recv Qty | Unit Price | Cust Price | Restk Charge % | Return Amt | Edit | Delete | Location |
|--------|--------------------------------|-----|-----|------------|-----------|----------|------------|------------|----------------|------------|------|--------|----------|
| 1      | AE50001 Arctic Heater - 5-1 AE | ea  |     | 0          | 1         | 1        | 520.00     | ea         | 0.00           | 0.00       | Edit | Delete | Location |

Add New
<< Back
Receive
Exit

Click **Location** to Pick Item for Customer Exchange

Enter Qty Being Picked

Item Stock Location

| Stock Location | Pick Qty                       | Location Available Qty |
|----------------|--------------------------------|------------------------|
| SL 001         | <input type="text" value="3"/> |                        |

Save

| Location          | Pick Qty |
|-------------------|----------|
| No Data was found |          |

Close Window

Click **Save**

Item Stock Location


| Location     | Pick Qty |
|--------------|----------|
| SL 001       | 1        |
| <b>Total</b> | 1        |

Close Window

Click **Close Window**



# SO Returns – Extras (Exchange Item)



Ximple Solutions

**Sales Return - Items**

01/24/2010  
16:50:32  
User Guide

Return # 155

|                       |            |                         |                  |                       |        |
|-----------------------|------------|-------------------------|------------------|-----------------------|--------|
| <b>Return Date</b>    | 01/24/2010 | <b>Customer</b>         | Custar Electrics | <b>Total Line</b>     | 0.00   |
| <b>Return Type</b>    | No Inv     | <b>Order #</b>          |                  | <b>Restocking Fee</b> | 0.00 - |
| <b>Require Pickup</b> |            | <b>Invoice # - Type</b> |                  | <b>Total Tax</b>      | 0.00   |
| <b>Direct Ship</b>    |            | <b>Vendor</b>           |                  | <b>Pickup Charge</b>  | 0.00 - |
| <b>Return Status</b>  | WMP        |                         |                  | <b>Total</b>          | 0.00   |

| Line # | Item                           | Qty UOM | Return Qty | Exchg Qty | Recv Qty | Unit Price | Cust Price | Restk Charge % | Return Amt | Edit | Delete |          |
|--------|--------------------------------|---------|------------|-----------|----------|------------|------------|----------------|------------|------|--------|----------|
| 1      | AE50001 Arctic Heater - 5-1 AE | ea      | 0          | 1         | 1        | 520.00 ea  |            | 0.00           | 0.00       | Edit | Delete | Location |

Add New
<< Back
Receive
Exit

Click **Receive**



Ximple Solutions

**Sales Return List**

01/24/2010  
16:58:42  
User Guide

Sales Return List

| Return # | Type   | Date       | Invoice # | Order # | Store     | Customer         | Dir Ship | Req Pickup | Status |
|----------|--------|------------|-----------|---------|-----------|------------------|----------|------------|--------|
| 155      | No Inv | 01/24/2010 |           |         | Rockville | Custar Electrics |          |            | Closed |

Add New
Back



# Returns – Certification

- 1. Search for Returns**
- 2. Enter Return**
  - 1. w/ Invoice**
  - 2. w/o Invoice**
- 3. Receive Return**
  - 1. Require Pickup**
  - 2. Non-pickup**
- 4. Refund Customer**
- 5. Exchange Item**

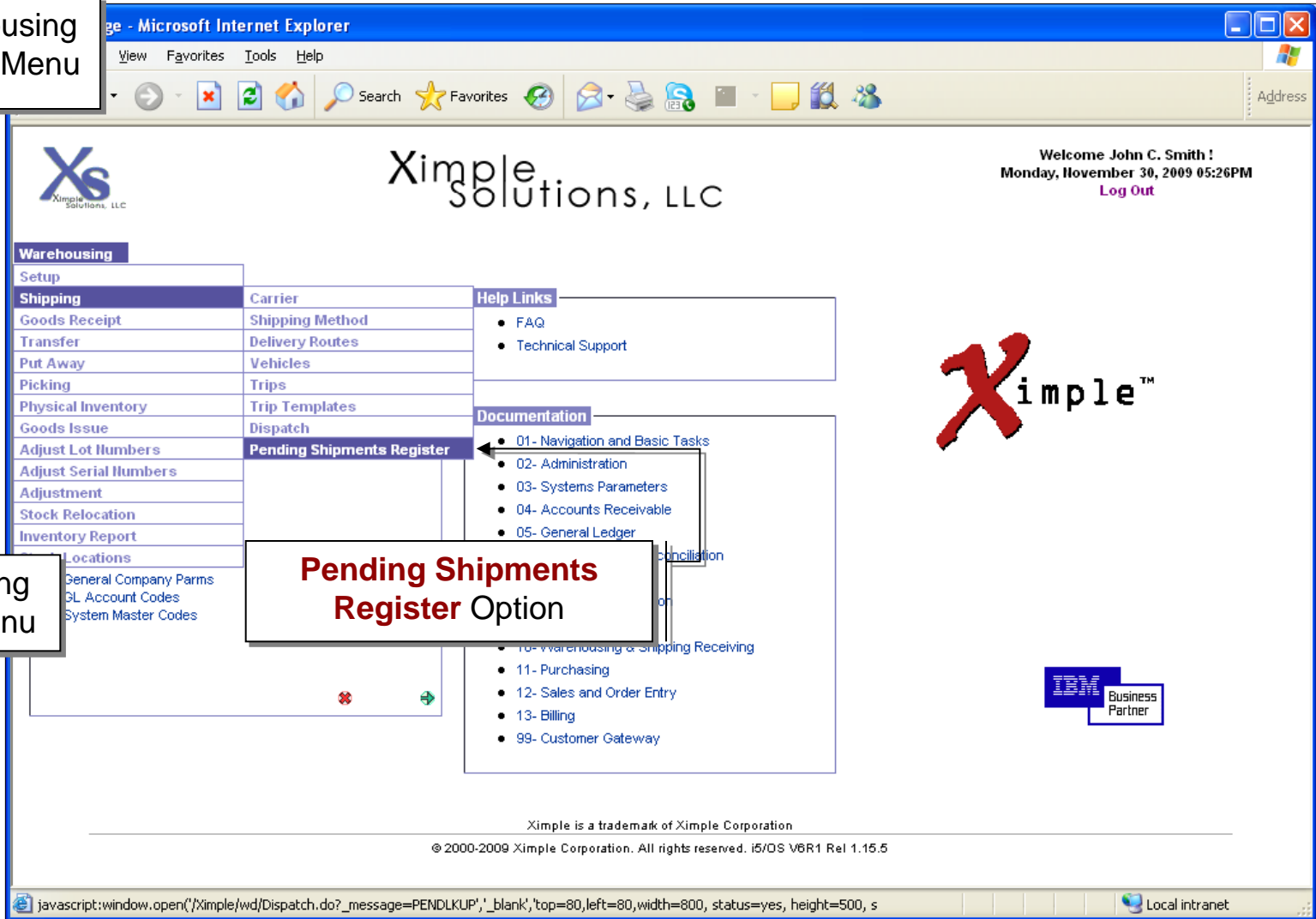


# Pending Shipments Register

Warehousing  
Module Menu

Shipping  
Submenu

Pending Shipments  
Register Option



The screenshot shows a web browser window displaying the Ximple Solutions, LLC interface. The browser is Microsoft Internet Explorer. The page header includes the Ximple logo, the company name "Ximple Solutions, LLC", and a welcome message for John C. Smith dated Monday, November 30, 2009 05:26PM, with a "Log Out" link.

The main navigation menu is divided into two sections: "Warehousing" and "Shipping". The "Warehousing" section includes links for Setup, Shipping, Goods Receipt, Transfer, Put Away, Picking, Physical Inventory, Goods Issue, Adjust Lot Numbers, Adjust Serial Numbers, Adjustment, Stock Relocation, and Inventory Report. The "Shipping" section includes links for Carrier, Shipping Method, Delivery Routes, Vehicles, Trips, Trip Templates, and Dispatch. The "Pending Shipments Register" option is highlighted in the Shipping section.

On the right side of the page, there are "Help Links" (FAQ, Technical Support) and "Documentation" (01- Navigation and Basic Tasks, 02- Administration, 03- Systems Parameters, 04- Accounts Receivable, 05- General Ledger, 10- Warehousing & Shipping Receiving, 11- Purchasing, 12- Sales and Order Entry, 13- Billing, 99- Customer Gateway).

The footer contains the text: "Ximple is a trademark of Ximple Corporation", "© 2000-2009 Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.15.5", and a JavaScript command: "javascript:window.open('/Ximple/wd/Dispatch.do?\_message=PENCLKUP','\_blank','top=80,left=80,width=800,status=yes,height=500,s')".



# Pending Shipments Register

Enter Search Criteria



Ximple Solutions

**Pending Shipment Register**

11/30/2009

17:32:28

User Guide

**Pending Shipments Lookup (P 1306)**

|                      |   |   |                          |
|----------------------|---|---|--------------------------|
| <b>Sales Order #</b> | <input style="width: 90%;" type="text"/>                    |   |                          |
| <b>OR</b>            |   |   |                          |
| <b>Warehouse</b>     | <input style="width: 80%;" type="text" value="Rockville"/>  |   |                          |
| <b>Shipment Date</b> | <input style="width: 40%;" type="text" value="11/23/2009"/> | <input style="width: 40%;" type="text" value="11/30/2009"/> |                          |
| <b>Customer</b>      | <input style="width: 40%;" type="text"/>                    | <input type="checkbox"/> One Time Customer                  | <input type="checkbox"/> |

Click **Lookup**



# Pending Shipments Register

Click to view **Non Will Call** Shipments



Ximple Solutions

## Pending Shipment Register

11/30/2009  
17:32:34  
User Guide

Will Calls

Non Will Calls

| Pending Shipment Register (P1307) |            |                    |           |                 |      |          |             |
|-----------------------------------|------------|--------------------|-----------|-----------------|------|----------|-------------|
| Sales Order #                     | Ship Date  | Customer           | Warehouse | Shipping Method | Trip | Shipment | Ship Status |
| 551                               | 11/24/2009 | Custar Electronics | Rockville | Will Call       | 19   | 470      | Picked      |

View  
Dispatch  
Unenroll

Back

Refresh

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Popup  
Menu

Return to  
Lookup



# Pending Shipments Register (un-enroll)



**Ximple Solutions**  
**Pending Shipment Register**

**11/30/2009**  
**17:38:33**  
**User Guide**

Will Calls
Non Will Calls

| Pending Shipment Register (P1307) |            |                  |           |                 |      |          |             |
|-----------------------------------|------------|------------------|-----------|-----------------|------|----------|-------------|
| Sales Order #                     | Ship Date  | Customer         | Warehouse | Shipping Method | Trip | Shipment | Ship Status |
| 509                               | 11/05/2009 | Custar Electrics | Rockville | UPS Ground      | 174  | 442      | Picked      |
| 509                               | 11/05/2009 | Custar Electrics | Rockville | UPS Ground      | 174  | 443      | Picked      |
| 510                               | 11/05/2009 | Custar Electrics | Rockville | UPS Ground      | 174  | 444      | Picked      |

Back
Refresh

Select  
**Unenroll**



# Pending Shipments Register (enroll)



Ximple Solutions

## Pending Shipment Register

11/30/2009  
17:38:46  
User Guide

Will Calls

Non Will Calls

| Pending Shipment Register (P1307) |            |                  |           |                 |      |          |             |
|-----------------------------------|------------|------------------|-----------|-----------------|------|----------|-------------|
| Sales Order #                     | Ship Date  | Customer         | Warehouse | Shipping Method | Trip | Shipment | Ship Status |
| 509                               | 11/05/2009 | Custar Electrics | Rockville | UPS Ground      | 174  | 442      | Picked      |
| 509                               | 1/05/2009  | Custar Electrics | Rockville | UPS Ground      | 0    | 443      | Picked      |
| 510                               | 1/05/2009  | Custar Electrics | Rockville | UPS Ground      | 174  | 444      | Picked      |

[View](#)  
[Dispatch](#)  
[Enroll to Trip](#)

Back


Refresh

Select **Enroll to Trip**



# Pending Shipments Register (enroll)

Lists ALL pending/planned Trips



**Ximple Solutions**  
**Enroll to Trip**

11/30/2009  
17:41:23  
User Guide

| Trip # | Departure  | Warehouse | Shipping Method | Route | Wave | Stg Location | Dock Door | Status  |
|--------|------------|-----------|-----------------|-------|------|--------------|-----------|---------|
| 3      | 10/05/2006 | Rockville | Will Call       |       |      |              |           | Planned |
| 12     | 05/23/2007 | Rockville | Will Call       |       | 1    | SL 001       | DD01      | Planned |
| 19     | 07/19/2007 | Rockville | Will Call       |       | 1    | SL 001       | DD01      | Planned |
| 46     | 10/14/2008 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 66     | 04/29/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 67     | 05/04/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 79     | 05/12/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 105    | 05/18/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 114    | 06/09/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 115    | 06/11/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 116    | 06/12/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |
| 117    | 06/15/2009 | Rockville | UPS Ground      |       |      |              |           | Planned |

Position to Date :

Select **Trip #**

Click to View  
Next Page



# Pending Shipments Register (Dispatch)

**Xs** Ximple Solutions, LLC

Ximple Solutions

**Pending Shipment Register**

11/30/2009 17:44:08 User Guide

Will Calls Non Will Calls

Pending Shipment Register (P1307)

| Sales Order # | Ship Date | Customer         | Warehouse | Shipping Method | Trip | Shipment | Ship Status |
|---------------|-----------|------------------|-----------|-----------------|------|----------|-------------|
| 509           | 1/05/2009 | Custar Electrics | Rockville | Will Call       | 19   | 443      | Picked      |

View Dispatch Unenroll

Back Refresh

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Select **Dispatch**

**Xs** Ximple Solutions, LLC

Ximple Solutions

**Dispatch Shipment**

11/30/2009 17:44:51 User Guide

Order Info (P1304)

|            |                |          |                  |                |                    |
|------------|----------------|----------|------------------|----------------|--------------------|
| Order #    | 509            | Customer | Custar Electrics | Payment Method | On Account         |
| Order Type | Standard Order | Cust PO  |                  | S & H          | 2.00 (Must Charge) |
| Order Date | 11/05/2009     | Job Name |                  | Status         | In Fulfillment     |
|            |                | Store    | Rockville        | Sales Rep.     | User Guide         |

| Item                           | Uom | Shipment Qty | Shipped Qty | Prepaid Qty | Picked Qty | Dispatch Avb. Qty | Dispatch Qty |
|--------------------------------|-----|--------------|-------------|-------------|------------|-------------------|--------------|
| AE50001 Arctic Heater - 5-1 AE | ea  | 1            | 0           | 0           | 1          | 1                 | 1            |

Charge S & H: 2.00

Submit Cancel

Click **Submit**

Enter Dispatch Qty.



# Pending Shipments Register (Dispatch)

-- Web Page Dialog

Save a Copy

Pages

Attachments

Comments

**Invoice / Packing Slip** Page 1

**Xs**  
Ximple  
Solutions, LLC  
1 Main Street  
Columbia, MD 21044  
Phone (301)345-6789

|               |            |                  |             |
|---------------|------------|------------------|-------------|
| Invoice #     | Sales #    | Sales Rep        | Ship Method |
| 2653          | 509        | User Guide       | Will Call   |
| Dispatch Date | Sales Date | Job Name         |             |
| 11/30/2009    | 11/05/2009 |                  |             |
| Cust Acct #   | Cust PO    | PO Release       | Tax Exempt  |
| 150           |            |                  |             |
| Packed By     | Checked By | Staging Location | Route       |
|               |            |                  |             |


Received By

Custar Electric

Dispatched At

Rockville  
4568 Oak Street NW  
Rockville, MD 20852

Invoice #

  
0000000002653

| Line # | UPC         | Mfr Catalog#<br>Item Description<br>Comments               | HM | Prev Ship | BO Qty | Ship Qty | UOM | Unit Price | Disc% | Extended |
|--------|-------------|--|----|-----------|--------|----------|-----|------------|-------|----------|
| 1      | 10001050001 | AE50001 - Arctic Electric, Inc.<br>5-1<br>(NOT RETURNABLE) |    | 0         | 0      | 1        | ea  | 577.78/ea  |       | 577.78   |

Click to Print

1 of 1

Close PDF



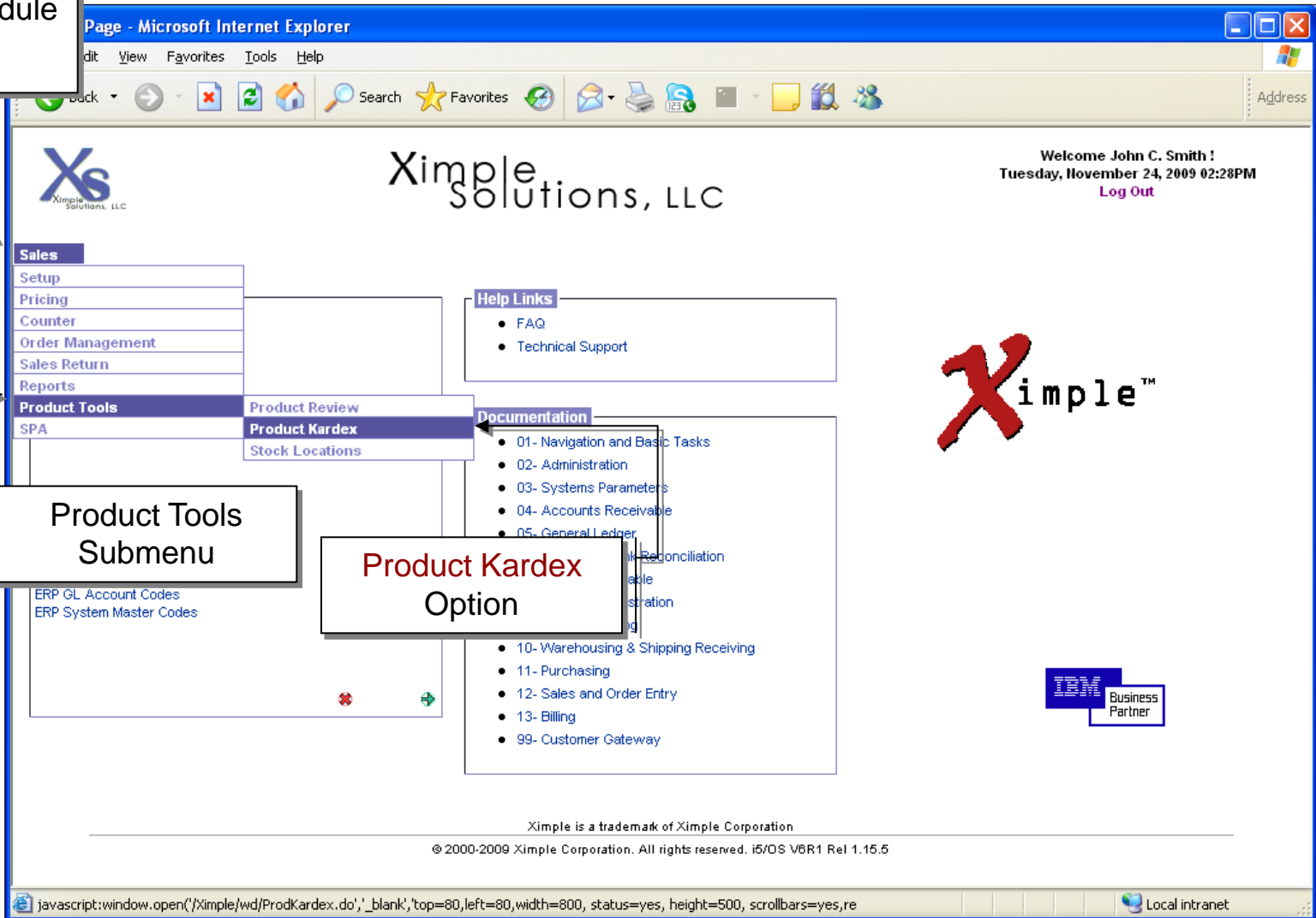
## **Pending Shipment Register – Certification**

- 1. View Pending Shipments**
- 2. Lookup Shipment**
- 3. Verify Picking**
- 4. Dispatch Shipment**
- 5. Un-enroll shipment from Will Call to Non-Will Call**
- 6. Un-enroll shipment from Non-Will Call to Will Call**



# Product Kardex

Sales Module  
Menu



The screenshot shows a web browser window titled "Page - Microsoft Internet Explorer". The address bar is empty. The page header includes the Ximple Solutions, LLC logo and a welcome message: "Welcome John C. Smith! Tuesday, November 24, 2009 02:28PM Log Out".

The main navigation menu on the left includes the following items:

- Sales
- Setup
- Pricing
- Counter
- Order Management
- Sales Return
- Reports
- Product Tools
- SPA

The "Product Tools" submenu is expanded, showing the following options:

- Product Review
- Product Kardex
- Stock Locations

The "Product Kardex" option is highlighted. A callout box labeled "Product Kardex Option" points to this option.

The "Help Links" section on the right includes:

- FAQ
- Technical Support

The "Documentation" section on the right includes a list of topics:

- 01 - Navigation and Basic Tasks
- 02 - Administration
- 03 - Systems Parameters
- 04 - Accounts Receivable
- 05 - General Ledger
- 06 - Reconciliation
- 07 - Billing
- 08 - Inventory
- 09 - Warehousing & Shipping Receiving
- 10 - Purchasing
- 11 - Sales and Order Entry
- 12 - Billing
- 99 - Customer Gateway

The footer of the page includes the text: "Ximple is a trademark of Ximple Corporation" and "© 2000-2009 Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.15.5".



# Product Kardex



**Ximple Solutions**  
**Product Kardex**

11/24/2009  
17:09:16  
User Guide

| Product Kardex  |   |                   |   |
|---|---|-------------------|---|
| <b>*Warehouse</b>   | Rockville <input type="button" value="v"/>                  | <b>*From Date</b> | 11/01/2009 <input type="button" value="v"/> |
| <b>*Product</b>   | AE10005 Arctic Lamp 1-5 AE <input type="button" value="v"/> | <b>*To Date</b>   | 11/24/2009 <input type="button" value="v"/> |
| <input type="button" value="Submit"/> <input type="button" value="Close Window"/> |   |                   |   |


Complete  
Product  
Search

Click  
**Submit**



# Product Kardex

Click to open Product Review  
Will go over in Next Section



Ximple Solutions 2

**Product Kardex**

11/26/2012

11:56:08

User Guide

**Product Kardex**

**\*Warehouse** MCK

**\*Product** AE AE10002 Ceiling Lamp 10002-B35

**\*From Date** 11/01/2012

**\*To Date** 11/26/2012

Submit
Close Window

**Product Info (P0281)**

|                         |  |                          |                        |
|-------------------------|--|--------------------------|------------------------|
| <b>Name</b>             | AE AE10002 Ceiling Lamp 10002-B35 [AA] | <b>Short Description</b> | Ceiling Lamp 10002-B35 |
| <b>Type</b>             | Material                               | <b>UPC</b>               | 10001010002            |
| <b>Manufacturer</b>     | Arctic Electric                        | <b>Generic</b>           | No                     |
| <b>Brand</b>            | Arctic                                 | <b>Stock Item</b>        | No                     |
| <b>Product Line</b>     | Arctic Lamp                            | <b>Inventory Item</b>    | No                     |
| <b>Long Description</b> | Arctic Lamp - Free Standing; 3-Bulbs   |                          |                        |

**Stock Availability**

| Available Qty | On Hand Qty | Committed Qty | BO Qty - HO | Dmg Qty<br>OnHnd / Cmt | Dfc Qty<br>OnHnd / Cmt | Incoming<br>Transfer Qty | Vendor<br>On Order Qty | Will Call<br>Loc. Qty | Order Pend<br>Inv Qty |
|---------------|-------------|---------------|-------------|------------------------|------------------------|--------------------------|------------------------|-----------------------|-----------------------|
| 83            | 94          | 9             | 3 1         | 0 / 0                  | 2 / 0                  | 0                        | 41                     | 30                    | 0                     |

**Transaction History**

| Trn Date          | Doc Type     | Doc #    | Entity Name     | Quantity | PO # | Unit Cost | Total Cost |
|-------------------|--------------|----------|-----------------|----------|------|-----------|------------|
| 11/16/2012        | Adjustment   | 165      |                 | 0 +      |      | 50.39     | 5.00       |
| 11/01/2012        | Cash Invoice | 566000-1 | Johans Electric | 2 -      |      | 50.33     | 100.67     |
| <b>Total</b>      |              |          |                 | 2 -      |      |           | 95.67      |
| <b>Total Days</b> |              |          |                 | 26       |      |           |            |

Link to Stock Location Page

[Cmt Qty](#)

[Trns Qty](#)

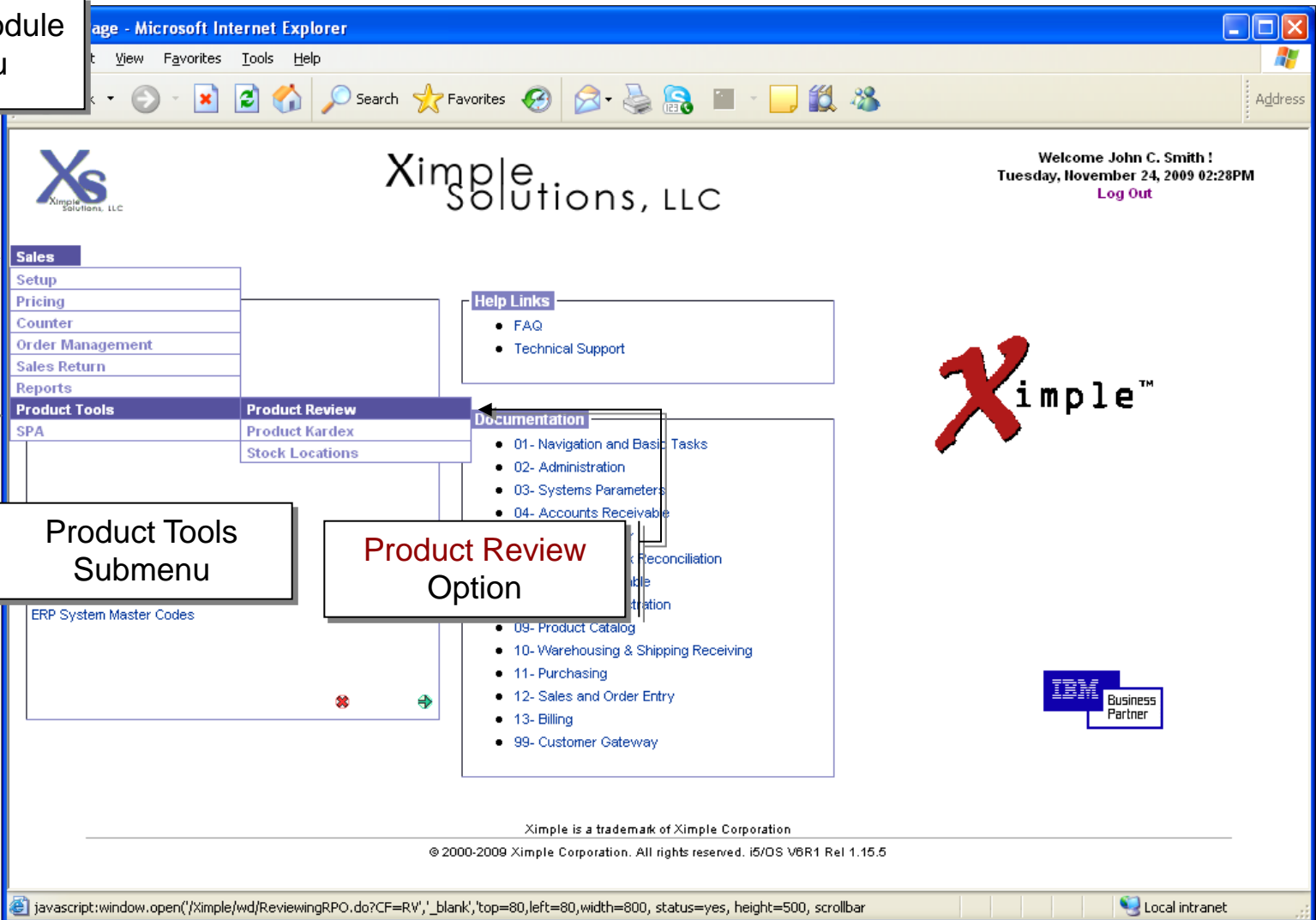
[PO Qty](#)

Links to Document  
Details



# Product Review

Sales Module  
Menu



Microsoft Internet Explorer

View Favorites Tools Help

Search Favorites

Address

Welcome John C. Smith!  
Tuesday, November 24, 2009 02:28PM  
[Log Out](#)

Ximple Solutions, LLC

**Sales**

- Setup
- Pricing
- Counter
- Order Management
- Sales Return
- Reports
- Product Tools**
  - Product Review
  - Product Kardex
  - Stock Locations
- SPA

**Help Links**

- FAQ
- Technical Support

**Documentation**

- 01- Navigation and Basic Tasks
- 02- Administration
- 03- Systems Parameters
- 04- Accounts Receivable
- 09- Product Catalog
- 10- Warehousing & Shipping Receiving
- 11- Purchasing
- 12- Sales and Order Entry
- 13- Billing
- 99- Customer Gateway

ERP System Master Codes

IBM Business Partner

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javascript:window.open('Ximple/wd/ReviewingRPO.do?CF=RV','\_blank',top=80,left=80,width=800,status=yes,height=500,scrollbar)

Local intranet



# Product Review

Select Product

|   |   |  |
|---|---|--|
|  | Ximple Solutions<br><b>Review Product</b>               | 11/24/2009<br>16:59:02<br>User Guide                               |
| Product Information   |   |  |
| Product   | <input type="text" value="AE10005 Arctic Lamp 1-5 AE"/> | <input type="button" value="V"/> <input type="button" value="Go"/> |
| <input type="button" value="Close Window"/>                                       |   |  |



# Product Review - (Product Tab)



Ximple Solutions 2  
Review Product

11/26/2012  
11:58:19

Product / Sales / RPO Tabs

## Product Information

|              |                              |                |             |
|--------------|------------------------------|----------------|-------------|
| Product      | AE AE20001 Short Description | V              | Go          |
| UPC          | 10001020001                  | Mfr. Catalog # | AE20001     |
| Description  | Short Description            |                |             |
| Brand        | Arctic                       | Product Line   | Arctic Lamp |
| Manufacturer | Arctic Electric              | Product Type   | Material    |
| Selling UOM  | EA                           | Stock Item     | Yes         |
|              |                              | Inventory Item | Yes         |

Select to  
View Cost

Product Sales RPO

## Vendor Item Price

|                 |      |          |          |         |           |              |              |
|-----------------|------|----------|----------|---------|-----------|--------------|--------------|
| Arctic Electric | Type | Min. Qty | Min. Amt | Min. Wt | Incr. Qty | Ig. Min. Blw | Mfg. Catalog |
| Min. Order      |      |          |          |         | 1         |              | AE20001      |
| Min. Freight    |      |          |          |         |           |              |              |

| Price Type                    | Price   | Currency  | Branch | Eff. From  | Eff. To | Break Type | Min. Qty | Min. Amt |
|-------------------------------|---------|-----------|--------|------------|---------|------------|----------|----------|
| Distributor Cost Price (Base) | 1.31 EA | US Dollar |        | 05/12/2010 |         |            | 0        | 0.00     |
| List Price                    | 2.31 EA | US Dollar |        | 05/12/2010 |         |            | 0        | 0.00     |

## Stock

| Warehouse    | Avb Qty | On Hand Qty | Committed Qty | BO Qty- HO | Dmg Qty | Dfc Qty | Incoming Trnsf Qty | OP (Sys) | OP (Usr) | Override Sys OP | Min Stock | Max Stock |
|--------------|---------|-------------|---------------|------------|---------|---------|--------------------|----------|----------|-----------------|-----------|-----------|
| Rockville    | 0       | 0           | 0             | 0          | 0       | 0       | 0                  | 0        | 0        | N               | 0         | 0         |
| MCK          |         | 76          | 11            | 2          | 0       | 1       | 0                  | 43       | 0        | Y               | 10        | 0         |
| BPK          |         | 10          | 0             | 0          | 0       | 0       | 0                  | 0        | 0        | Y               | 10        | 0         |
| Ellicott     | 151     | 202         | 0             | 0          | 0       | 51      | 0                  | 0        | 0        | Y               | 300       | 0         |
| Gaithersburg | 100     | 100         | 0             | 0          | 0       | 0       | 0                  | 0        | 0        | N               | 0         | 0         |
| Total:       | 325     | 388         | 11            | 2          | 0       | 52      | 0                  | 43       | 0        |                 | 320       | 0         |

Link to  
PO Info

## Incoming Shipments (Exclude Dir Ship)

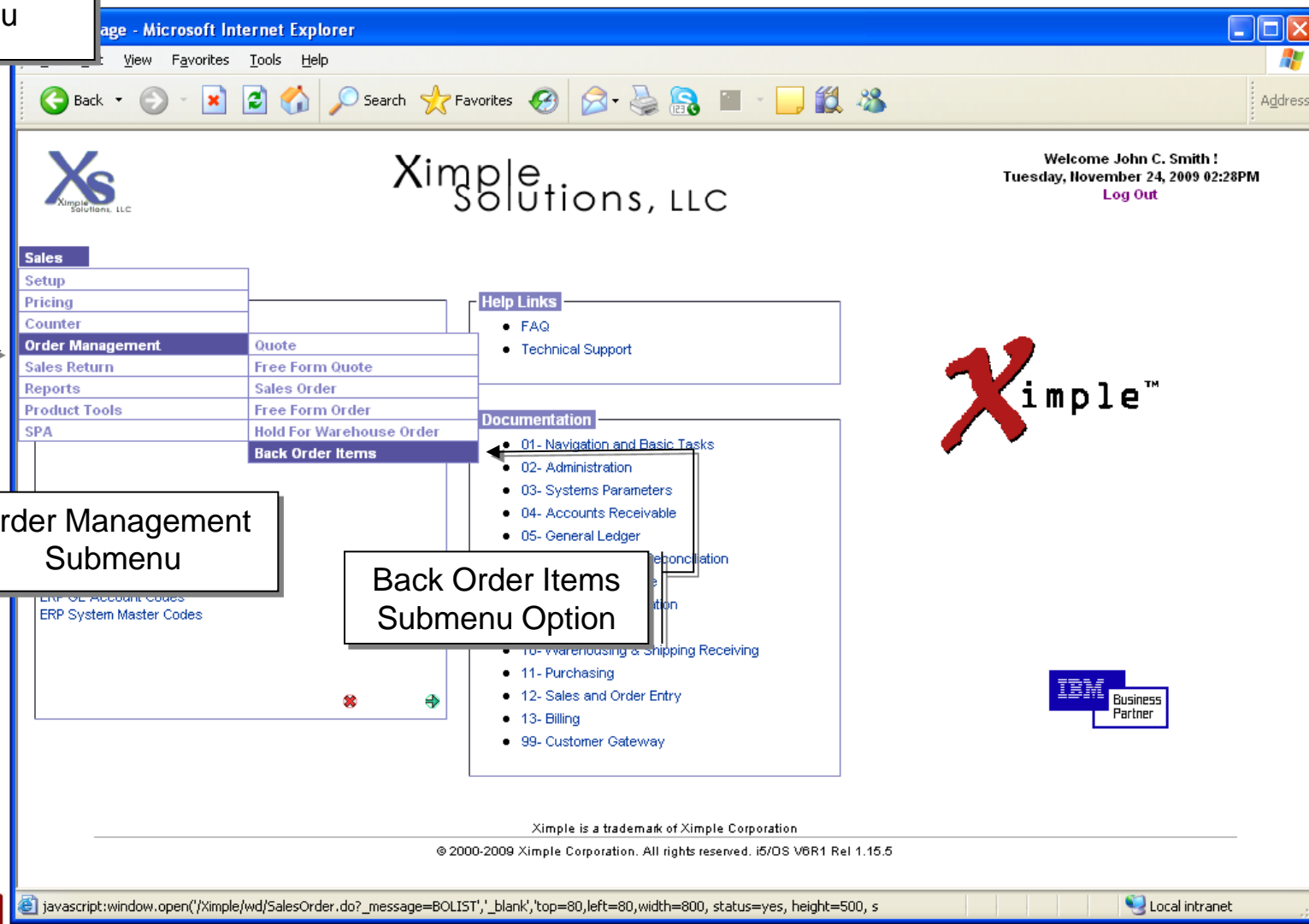
| Warehouse | Ordered Qty | Received Qty | Pending Qty |
|-----------|-------------|--------------|-------------|
| Ellicott  | 155         | 0            | 155         |
| Total:    | 155         | 0            | 155         |

Close Window



# Back Order Items

Sales Module  
Menu



The screenshot shows a web browser window displaying the Ximple Solutions, LLC application. The browser is Microsoft Internet Explorer. The application header includes the Ximple logo, the company name, and a welcome message for John C. Smith dated Tuesday, November 24, 2009 02:28PM, with a Log Out link.

The main navigation menu is divided into two columns. The left column contains the following items: Sales, Setup, Pricing, Counter, Order Management, Sales Return, Reports, Product Tools, and SPA. The right column contains: Help Links (FAQ, Technical Support), Documentation (01- Navigation and Basic Tasks, 02- Administration, 03- Systems Parameters, 04- Accounts Receivable, 05- General Ledger, 06- Inventory, 07- Warehousing & Shipping Receiving, 11- Purchasing, 12- Sales and Order Entry, 13- Billing, 99- Customer Gateway), and an IBM Business Partner logo.

The 'Order Management' item in the left column is highlighted, and a submenu is displayed to its right. This submenu includes the following options: Quote, Free Form Quote, Sales Order, Free Form Order, Hold For Warehouse Order, and Back Order Items. The 'Back Order Items' option is highlighted, and a callout box points to it with the text 'Back Order Items Submenu Option'.

At the bottom of the page, there is a footer with the text: 'Ximple is a trademark of Ximple Corporation. © 2000-2009 Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.15.5'. The browser status bar shows a JavaScript command: 'javascript:window.open('/Ximple/wd/SalesOrder.do?\_message=BOLIST','\_blank','top=80,left=80,width=800,status=yes,height=500,s'.


Order Management  
Submenu

Back Order Items  
Submenu Option



# Back Order Items

Enter Search Criteria



Ximple Solutions 2
11/26/2012
11:51:53
User Guide


Book/Back Orders Lookup

|                        |                                     |                                  |   |
|------------------------|-------------------------------------|----------------------------------|---|
| Customer               | <input type="text"/>                | <input type="button" value="V"/> | <input checked="" type="checkbox"/> All Customers |
| Store                  | MCK                                 |                                  |   |
| Sales Rep.             | User Guide                          |                                  |   |
| One Time Customer Only | <input type="checkbox"/>            |                                  |   |
| Back Order Only        | <input checked="" type="checkbox"/> |                                  |   |
| Force Back Order Only  | <input type="checkbox"/>            |                                  |   |

Click **Lookup**



# Back Order Items



Ximple Solutions 2

Book/Back Orders Item List

11/26/2012

11:53:30

User Guide

| Order #                       | Product                           | EBO | Order Qty | Cmt. Qty | Trmf. Qty | Back Order Qty | Avb Qty | On Order Qty (Regular) | Forced BO Qty | On Hold | Type | Order Date     | Store / Warehouse | Customer        | Booked Date | Sales Rep. | Status |
|-------------------------------|-----------------------------------|-----|-----------|----------|-----------|----------------|---------|------------------------|---------------|---------|------|----------------|-------------------|-----------------|-------------|------------|--------|
| 1110                          | AE AE60088 AE 6-88                |     | 30        | 0        | 0         | 30             | EA      | 0                      | 0             | 0       | Y    | Cash Order     | 03/09/2011 MCK    | Johans Electric | 03/09/2011  | User Guide | Booked |
| 1549                          | AE AE10001 AE Short Description   | Y   | 30        | 4        | 0         | 26             | EA      | 115                    | 35            | 0       |      | Standard Order | 08/09/2012 MCK    | Custar Electric | 08/09/2012  | User Guide | Booked |
| <input type="checkbox"/> 1897 | AE AE10002 Ceiling Lamp 10002-B35 |     | 3         | 0        | 0         | 3              | EA      | 83                     | 43            | 3       |      | Cash Order     | 11/26/2012 MCK    | Custar Electric | 11/26/2012  | User Guide | Booked |

Hold For Warehouse Orders

| Order #  | Product | Order Qty | Cmt. Qty | Released Qty | Back Order Qty | Avb Qty | On Order Qty (Regular) | Order Date | Store / Warehouse | Customer | Booked Date | Sales Rep. | Status |
|--|---------|-----------|----------|--------------|----------------|---------|------------------------|------------|-------------------|----------|-------------|------------|--------|
| <div> <div></div> <div>No data was found.</div> </div> |         |           |          |              |                |         |                        |            |                   |          |             |            |        |

Back

Fulfill BO

Close Window

Check to Fulfill

**Yellow Lines =  
Forced BO qty > 0 AND  
Is NOT EBO AND  
Is NOT On Hold**

**You Can Fulfill Order if Qty is In Stock**



# ***END Sales & Order Entry Overview***