

Realtime Software Corporation - Sales Order Manual

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SALES ORDERS

A. ORDER ENTRY

For information on entering Apparatus Orders with S/O#'s, refer to the New Apparatus Procedure Manual. For information on entering Service Orders refer to the Service Order Manual.

To enter a customer's order, type the **Screen Jump OE** at any menu. **Type ??** and partial name of customer to search.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
CUST#  ??HARR...*XXXXX
```

Type the sequence number shown to the left of the customer you want to use. As a general rule, if there is a ship-to number listed in addition to the bill-to customer number, **always select the ship-to for orders**. A Ship-to number has the same customer number as the bill-to, but with a ship-to sequence. The example below is sequence 001. If no ship-to is available, select the bill-to customer.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04

Seq. Customer                               Number             Searching on HARR
  1 HARRELLS VFD                             14860              HARRELLS NC
  2 HARRELL MEDICAL TRANSPORT                14870              GATESVILLE NC
  3 HARRELLSVILLE FIRE DEPARTMENT            14880              HARRELLSVILLE NC
  4 HARRELLSVILLE FIRE DEPARTMENT            14880*001          HARRELLSVILLE NC
  5 HARRIS EQUIPMENT CO.                     14890              WARRENTON NC

Enter Seq., * To Exit, PB Page Back, C Change Search, or (RTN) to page. 4....
```

If you need to change the ship-to address, **type S** to change and enter the correct information. Then **ENTER** to continue with order.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
CUST# 14880*001                          ** ORDER NO.

NAME      HARRELLSVILLE FIRE DEPARTMENT    1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                       2. S    158 JOHNSON AVE
ADDR 2                                         3. H T
CITY      HARRELLSVILLE                     4. I O HARRELLSVILLE
ST/CNTY  NC                                5. P    NC
ZIP/PST  27942                              6.      27942
COUNTRY                                       7.

ENTER * TO EXIT, S TO CHANGE SHIP-TO, Y OR RTN TO CONTINUE ORDER/QUOTE .
```

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ENTER to scroll through the lines, typing whatever information is necessary. Some of these fields will be pre-loaded with information from the Customer selected. Other fields may be pre-loaded and/or skipped based on your system Template configuration.

The **Order Type (Line 14)** is very important and you can do a **?** to look up the different order types available. Ship Via - Line 15 has a **?** look up as well or anything can be typed in the field. Line 17 SLMN1 defaults to the territory salesman assigned to this customer. **SLMN2** needs to be entered with your own salesman number to track who entered the order. Depending on your system configuration, salesman 2 may automatically pre-load on your orders. When you get through all the fields to the bottom of the screen, you can type any sequence number to return to a field and change it. **ENTER** to continue to the parts detail screen.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	26 Jun 04
CUST# 14880*001	** ORDER NO. 345954		
NAME	HARRELLSVILLE FIRE DEPARTMENT	1. HARRELLSVILLE FIRE DEPARTMENT	
ADDR 1	P O BOX 361	2. S 158 JOHNSON AVE	
ADDR 2		3. H T	
CITY	HARRELLSVILLE	4. I O HARRELLSVILLE	
ST/CNTY	NC	5. P NC	
ZIP/PST	27942	6. 27942	
COUNTRY		7.	
8. ORDER DATE	06/26/03	14. ORDER TYPE	P
9. SINGLE/MULTIPLE SHIP DATES (S/M)	S	15. SHIP VIA	UPS GROUND
10. SHIP DATE	06/26/03 CANCEL	16. FOB	
11. CUST P.O.	15944	17. SLMN1 14	SLMN2 15 SLMN2 %
12. ORDERED BY	MATT	18. TERMS 30	NO \$ TICKET
13. SPECIAL INSTRUCTIONS		19. AR-CUST#	20. STATUS
		21. INTERNAL NOTES	22. FREE FREIGHT
ENTER LINE NUMBER TO CHANGE, * TO VOID, OR RTN TO CONTINUE ..			

Here is an example of different order types (Line 14) that can be used. In this case we have selected P for Parts and Equipment.

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```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
      Display of the ORDER-TYPE table, by Code
SQ   Code      Description              Drop Lbr Svc Futr Xfer Mrgn
 1   APP       NEW APPARATUS SALES                Y                    R
 2   DEM       DEMO EXPENSE                       Y   Y   Y
 3   FUTURE    EQPMT,NEW APPARATUS SALES                Y
 4   NEW       NEW APPARATUS INTERNAL              Y   Y   Y
 5   P         PARTS & EQUIPMENT                   Y                    R
 6   PD        PARTS DROP SHIP TO CUSTOMER          Y
 7   SERV      CUSTOMER REPAIR                     Y   Y   Y
 8   SERVD     CUSTOMER REPAIR, DROP SHIP          Y   Y   Y
 9   SHOP      BENCH WORK                          Y
10   T         TRANSFERS TO MOBILE #1 & #2          Y                    Y
11   WARR      WARRANTY REPAIR                     Y   Y   Y
12   WARRD     WARRANTY REPAIR, DROP SHIP          Y   Y   Y

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# .....
END OF SEARCH INDEX
    
```

Here is an example of different ship-via types (Line 15).

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
      Display of the SHIP-VIA table, by Code
SQ   Ship-Via  Description
 1   BESTWAY   BESTWAY
 2   BLUE      2ND DAY AIR
 3   CALL      UPS CALLTAG
 4   RED       UPS NEXT DAY AIR
 5   SLS       SALESMAN
 6   UPS       UPS GROUND
 7   WC        WILL CALL

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# .....
END OF SEARCH INDEX
    
```

In the parts detail screen, **type 01** for Site, then the **quantity** and **part number**. In this example, there are four on hand so the quantity to ship filled in automatically with the quantity ordered of 1.

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OE03A CW REALTIME SOFTWARE CORP		ORDER ENTRY			26 Jun 04	
CUST # 14880*001	HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD		
ORDER# 345954	ORD DT 06/26/03 CR LIMIT			A/R BAL		
SITE # 01				ORD VAL		
SEQ G QTY	ITEM NO.	ORD GROSS	QTY TO	PRICE	EXTENSION	
ORD'D	DESCRIPTION	UOM PROFIT%	SHIP			
001	1 EON-511351	EA.	1	146.23000	146.23	
	DOOR SWITCH					
TEXT						
	SI LOCATN	ON-HAND	COMM	AVAIL	O/O	DROP
	01	4	0	4		
		-----	-----	-----	-----	-----
		4	0	4	0	0

When finished with line one, continue with as many lines as needed. In this example we don't have any in stock for the part on line two, so **quantity to ship remains as zero** so it can be ordered. With certain configurations, the system may generate a PO for these items automatically.

OE03A CW REALTIME SOFTWARE CORP		ORDER ENTRY			26 Jun 04	
CUST # 14880*001	HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD		
ORDER# 345954	ORD DT 06/26/03 CR LIMIT			A/R BAL		
SITE # 01				ORD VAL	146.23	
SEQ G QTY	ITEM NO.	ORD GROSS	QTY TO	PRICE	EXTENSION	
ORD'D	DESCRIPTION	UOM PROFIT%	SHIP			
002	3 EON-511201	EA	0	78.00000	0.00	
	GASKET					
TEXT						
	SI LOCATN	ON-HAND	COMM	AVAIL	O/O	DROP
		-----	-----	-----	-----	-----

If you do not know the entire part# during Order Entry, you can enter ?: followed by the start of the part number to get an index list. Basically all the lookup options available in Inventory Inquiry work here as well.

On some system configurations, it is possible to create a new part# from within Order Entry.

When finished with parts entry, **ENTER** to continue. You can also type H here if you need to go back to the header for any reason (to change or enter a PO#, special instructions, etc.)

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OE03A CW REALTIME SOFTWARE CORP	ORDER ENTRY	26 Jun 04
CUST # 14880*001	HARRELLSVILLE FIRE DEPART SLM1 14 ON ORD	
ORDER# 345954	ORD DT 06/26/03 CR LIMIT	A/R BAL
SITE # 01 'GM' =	98.57 MSRP (SL)	ORD VAL 380.23
'GP' =	25.92% 'SL' DISC	0.00% COST EXT 281.66
SEQ G QTY ITEM NO.	ORD GROSS QTY TO PRICE	EXTENSION
ORD'D DESCRIPTION	UOM PROFIT% SHIP	
001 1 EON-511351	EA 25.920 1 146.23000	146.23
DOOR SWITCH	BIN#	
002 3 EON-511201	EA 25.920 0 78.00000	0.00
GASKET	BIN#	
ENTER (H)EADER, 'VAL', 'GM', 'GP', 'SL', OR 'M' FOR MARGIN DISPLAY ENTER SEQ TO CHANGE, P TO PAGE, * TO VOID, RTN TO CONTINUE ...		

This is the final screen of the order, also known as the Totals Screen. You can select line **3** to add freight, line **6** allows you to change a tax code, you can go back to **H** for header, **D** for parts detail, or if you're finished **type S** to spool (or save) the order, or **I to print** a pick ticket.

OE03A CW REALTIME SOFTWARE CORP	ORDER ENTRY	26 Jun 04
CUST # 14880*001	HARRELLSVILLE FIRE DEPART SLM1 14 ON ORD	
ORDER# 345954	ORD DT 06/26/03 CR LIMIT	A/R BAL
	TERMS 30 0.000%	ORD VAL 380.23
PRODUCT TOTAL	146.23	
2. DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT 146.23
		-TAXABLE-- TAX
	ORDER LINE CODE RATE%	TAX AMT
3. FREIGHT	Y	
4. MISCELLANEOUS		
5. MINIMUM ORDER CHG		
6. ORDER TAX AMOUNT	146.23 T	7.000 (%/\$) \$ 10.24
TOTAL TAX AMOUNT	10.24	
ORDER TOTAL	156.47	** PRODUCT TOTAL INCLUDES **
		BROKEN PKG CHARGES 0.00
		TOTAL OTHER MISC
ENTER (F)UTURE DATING, (H)EADER, (B)ILL, (C)ASH LINE TO CHANGE, (D)ETAIL, * TO VOID, S TO POST/SPOOL, I TO POST/PICK S .		

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If a customer wants the item(s) **drop-shipped** direct to them from the vendor, you will need to select a special order type to handle those orders. To do this, follow the instructions already given for Order Entry. On the Header (first) screen when you select the Order type (at prompt # 14), use the ? lookup option and select an order type with a **Y** in the **Drop** Column.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
      Display of the ORDER-TYPE table, by Code
SQ  Code      Description              Drop  Lbr  Svc  Futr  Xfer  Mrgn
 1  APP      NEW APPARATUS SALES          Y
 2  DEM      DEMO EXPENSE                 Y    Y    Y
 3  FUTURE   EQPMT,NEW APPARATUS SALES          Y    Y    Y
 4  NEW      NEW APPARATUS INTERNAL        Y    Y    Y
 5  P        PARTS & EQUIPMENT            Y
 6  PD      PARTS DROP SHIP TO CUSTOMER    Y
 7  SERV     CUSTOMER REPAIR              Y    Y    Y
 8  SERVD    CUSTOMER REPAIR, DROP SHIP     Y    Y    Y
 9  SHOP     BENCH WORK                   Y
10  T        TRANSFERS TO MOBILE #1 & #2    Y
11  WARR     WARRANTY REPAIR              Y    Y    Y
12  WARRD    WARRANTY REPAIR, DROP SHIP     Y    Y    Y

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# .....
END OF SEARCH INDEX
```

This example will select **PD** for parts & equipment **drop ship**.

It is very important to make sure that the ship-to address is correct, as the shipment will be coming from the vendor.

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OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	26 Jun 04
CUST# 22380	** ORDER NO. 345955		
NAME	LAFAYETTE VILLAGE FIRE DEPT	1.	LAFAYETTE VILLAGE FIRE DEPT
ADDR 1	307 HOPE MILLS ROAD	2. S	307 HOPE MILLS ROAD
ADDR 2		3. H T	
CITY	FAYETTEVILLE	4. I O	FAYETTEVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	28304	6.	28304
COUNTRY		7.	
8. ORDER DATE	06/26/03	14. ORDER TYPE	PD
9. SINGLE/MULTIPLE SHIP DATES (S/M)	S	15. SHIP VIA	UPS NEXT DAY AIR
10. SHIP DATE	06/26/03 CANCEL	16. FOB	
11. CUST P.O. MARK		17. SLMN1 17	SLMN2 15 SLMN2 %
12. ORDERED BY MARK		18. TERMS 30	NO \$ TICKET
13. SPECIAL INSTRUCTIONS		19. AR-CUST#	20. STATUS
		21. INTERNAL NOTES	22. FREE FREIGHT
ENTER LINE NUMBER TO CHANGE, * TO VOID, OR RTN TO CONTINUE ..			

Service and warranty orders use special order types as well. Please refer to the SERVICE ORDER manual for additional details.

SALES ORDERS

B. QUOTE ENTRY

Quote entry is very similar to order entry. Type the **Screen Jump QE** at any menu to enter a quote. At this first screen, you must select a quote type. You can do a ? search to look at the available order types. In this case we'll use **Q** for Quote Letter. **ENTER** to continue.

CQ03A	CW REALTIME SOFTWARE CORP	QUOTE ENTRY	30 Jun 04
CUST# 13270		** QUOTE NO. 112244	
NAME	DARLINGTON VOLUNTEER	1.	DARLINGTON VOLUNTEER
ADDR 1	FIRE DEPARTMENT	2. S	FIRE DEPARTMENT
ADDR 2	2611 HEDGEPEETH ROAD	3. H T	2611 HEDGEPEETH ROAD
CITY	HALIFAX	4. I O	HALIFAX
ST/CNTY	NC	5. P	NC
ZIP/PST	27839	6.	27839
COUNTRY		7.	
8. QUOTE DATE	06/30/03	14. QUOTE TYPE	Q
9. SINGLE/MULTIPLE SHIP DATES (S/M)	S	15. SHIP VIA	UPS GROUND
10. SHIP DATE	06/30/03 CANCEL	16. FOB	
11. CUST P.O.		17. SLMN1 11	SLMN2 15 SLMN2 %
12. ORDERED BY		18. TERMS	30 NO \$ TICKET
13. SPECIAL INSTRUCTIONS		19. AR-CUST#	20. STATUS
		21. INTERNAL NOTES	22. FREE FREIGHT
ENTER LINE NUMBER TO CHANGE, * TO VOID, OR RTN TO CONTINUE ..			

The next screen is the only one that is different from a entering a regular sales order. With certain settings in the Order Type, this screen will not be used for quotes.

If it comes up, you can change any of the information as necessary. If a special introductory statement has been set up in the background table, you can enter that on Line 7. If there is a contact already set up in the Customer's file (done with CM, Customer Maintenance, see Accounts Receivable, Section B), you can select it when you get to Line 13. Any contacts already set up will be listed in the lower portion of the screen. If not enter the information on Lines 14-18.

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```

CQ03A  CW REALTIME SOFTWARE CORP          QUOTE ENTRY          30 Jun 04

CUST # 13270          DARLINGTON VOLUNTEER          SLM1 11  ON ORD
QUOTE# 112244          QUO DT 06/30/03  CR LIMIT          A/R BAL          0.00
                                   QUO VAL

1. NAME  DARLINGTON VOLUNTEER..... 13. CONTACT#
2. ADDR 1 FIRE DEPARTMENT          14. MR/MS
3. ADDR 2 2611 HEDGEPEETH ROAD     15. F-NAME
4. CITY  HALIFAX                   16. M-INIT
5. STATE NC                         17. L-NAME
6. ZIP   27839                      18. TITLE
7. INTRO PARTS                      19. F/B TEXT
8. STATUS                                20. PACKAGE
9. QUOTE NOTES                       21. LEASE CODE
    
```

```

CQ03A  CW REALTIME SOFTWARE CORP          QUOTE ENTRY          30 Jun 04

CUST # 13270          DARLINGTON VOLUNTEER          SLM1 11  ON ORD
QUOTE# 112244          QUO DT 06/30/03  CR LIMIT          A/R BAL          0.00
                                   QUO VAL

1. NAME  DARLINGTON VOLUNTEER          13. CONTACT#
2. ADDR 1 FIRE DEPARTMENT          14. MR/MS
3. ADDR 2 2611 HEDGEPEETH ROAD     15. F-NAME          JOHN
4. CITY  HALIFAX                   16. M-INIT
5. STATE NC                         17. L-NAME          ALLEN
6. ZIP   27839                      18. TITLE           FIRE CHIEF
7. INTRO PARTS                      19. F/B TEXT
8. STATUS                                20. PACKAGE
9. QUOTE NOTES                       21. LEASE CODE

ENTER LINE#, (A#) FOR ALL, * TO VOID, (H)EADER, OR RTN TO CONTINUE ...
    
```

On the Detail screen, **type the site (01)** and the **quantity and item numbers** the same as you do in order entry. The main difference here is that since it is a quote, the quantity to ship will fill in the same as the quantity ordered even though there is insufficient stock. This is so the quote will be a complete dollar amount for the items entered.

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CQ03A CW REALTIME SOFTWARE CORP		QUOTE ENTRY		30 Jun 04	
CUST # 13270	DARLINGTON VOLUNTEER		SLM1 11	ON ORD	
QUOTE# 112244	QUO DT 06/30/03	CR LIMIT		A/R BAL	0.00
SITE # 01	'GM' = 101.31	MSRP (SL)		QUO VAL	390.75
	'GP' = 25.93%	'SL' DISC	0.00%	COST EXT	289.44
SEQ G QTY	ITEM NO.	QUO GROSS	QTY TO	PRICE	EXTENSION
	QUO'D DESCRIPTION	UOM PROFIT%	SHIP		
001	3 EON-512004	EA 25.930	3	55.89000	167.67
	ELEC. CONTROL VACUUM	BIN#			
002	4 EON-511990	EA 25.930	4	55.77000	223.08
	FRONT & REAR EXPANSION VALVE	BIN#			
ENTER (H)EADER, 'VAL', 'GM', 'GP', 'SL', OR 'M' FOR MARGIN DISPLAY ENTER SEQ TO CHANGE, P TO PAGE, * TO VOID, RTN TO CONTINUE ...					

Make any changes necessary on the totals (final) screen, and then **type I** to print or **S** to save. Just as in sales orders, you can go back to the header screen or detail screen from here if needed. You should take note the quote# for future reference.

CQ03A CW REALTIME SOFTWARE CORP		QUOTE ENTRY		30 Jun 04	
CUST # 13270	DARLINGTON VOLUNTEER		SLM1 11	ON ORD	
QUOTE# 112244	QUO DT 06/30/03	CR LIMIT		A/R BAL	0.00
		TERMS 30	0.000%	QUO VAL	390.75
PRODUCT TOTAL	390.75				
2. DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT			390.75
		-TAXABLE-- TAX			
		ORDER LINE CODE	RATE%		TAX AMT
3. FREIGHT		Y			
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. QUOTE TAX AMOUNT		390.75 T	7.000 (%/\$)	\$	27.35
TOTAL TAX AMOUNT	27.35				
QUOTE TOTAL	418.10	** PRODUCT TOTAL INCLUDES **			
		BROKEN PKG CHARGES			0.00
		TOTAL OTHER MISC			
ENTER (F)UTURE DATING, (H)EADER, (R)ELEASE, LINE TO CHANGE, (D)ETAIL, * TO VOID, S TO POST/SPOOL, I TO POST/PICK					

SALES ORDERS

C. ORDER AND QUOTE INQUIRY

Type the **Screen Jump OI** at any menu to inquire on an order. If you know the order number you can type it in.

```
OE12  CW REALTIME SOFTWARE CORP          OPEN ORDER INQUIRY          30 Jun 04
ORDER #  345952
(ENTER 'C' FOR INQUIRY BY CUSTOMER PURCHASE ORDER NUMBER)
(ENTER 'T' FOR INQUIRY BY SERVICE TAG NUMBER)
(ENTER '?' FOR INQUIRY BY ORDER NUMBER)
```

You can also **type a ?** in place of the order# which takes you to an open orders scroll. **Type another ?** here to see which department you want to list first.

```
OE07G CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          30 Jun 04
ENTER DEPARTMENT OR '?' TO LOOKUP (NULL = ALL)  ?
```

```
OE07G CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          30 Jun 04
      Display of the OT-DEPT table, by Dept
SQ  Dept  Description
 1   A    APPARATUS
 2   E    EQUIPMENT
 3   F    FUTURE NEW APPARATUS SETUP
 4   N    NEW APPARATUS
 5   P    PARTS & EQPMT
 6   S    SERVICE

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# .....
END OF SEARCH INDEX
```

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You can then see all the orders by the department that you selected. To the far right you can see these are parts & equipment orders by the P. When you find the order you want, **select the sequence number on the left** and you will automatically be taken into the order.

SQ	Order#	Cust#	Customer Name	Date	Total	Ship To	DP
OE07G CW REALTIME SOFTWARE CORP OPEN ORDERS SCROLL 30 Jun 04							
Display of the OO-XREF table, by Dept							
1	344310	13380	DUBLIN FIRE DEPARTME	03/12/03	204.00	DUBLIN FIRE DEP	P
2	344327	11130	TOWN OF AHOSKIE	03/13/03	19.38	TOWN OF AHOSKIE	P
3	344413	18780	SHARPSBURG FIRE PREV	03/14/03	24.00	SHARPSBURG FIRE	P
4	344685	10840	QUALITY AUTO REPAIR	03/20/03	382.29	QUALITY AUTO RE	P
5	344854	15410	JAMESVILLE COMMUNITY	03/25/03	0.00	JAMESVILLE COMM	P
6	344914	17950	TOWN OF RED SPRINGS	03/27/03	29,550.00	TOWN OF RED SPR	P
7	345035	21720	SALEM FIRE & EMS	04/01/03	119.75	SALEM FIRE & EM	P
8	345079	14620	CITY OF GREENVILLE	04/03/03	425.34	CITY OF GREENVI	P
9	345168	13460	THE CITY OF DURHAM,	04/08/03	0.00	THE CITY OF DUR	P
10	345205	14590	GREENVILLE FIRE - RE	04/09/03	717.93	GREENVILLE FIRE	P
11	345340	15580	CITY OF KINSTON	04/15/03	0.00	CITY OF KINSTON	P
12	345344	16670	TOWN OF NAGS HEAD	04/15/03	624.00	TOWN OF NAGS HE	P
13	345497	10840	QUALITY AUTO REPAIR	04/23/03	1,720.10	QUALITY AUTO RE	P
14	345527	16580	N. CHATHAM VOL. FIRE	04/24/03	143.17	N. CHATHAM VOL.	P
15	345566	17370	PEACHTREE FIRE DEPAR	04/24/03	0.00	PEACHTREE FIRE	P
16	345613	21250	DANVILLE FIRE DEPART	04/28/03	1,013.57	DANVILLE FIRE D	P
17	345823	14390	GASTON FIRE	05/06/03	45.00	GASTON FIRE	P
18	345885	20520	WHITAKERS FIRE DEPT.	05/08/03	4.63	WHITAKERS FIRE	P
(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ#							

Type D to see the quantity and items ordered in detail. **Type T** to go the totals screen. You can also **type O** for other header information to see the invoice number if this order has been completed. The order status would also say completed at this first screen.

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```

OE12    CW REALTIME SOFTWARE CORP                OPEN ORDER INQUIRY                30 Jun 04

ORDER #  345952
CUST#    14750                                SHIP-TO
NAME     HALIFAX FIRE                        HALIFAX FIRE
ADDR 1   HALIFAX FIRE & RESCUE INC.         S  HALIFAX FIRE & RESCUE INC.
ADDR 2   P O BOX 397                        H T P O BOX 397
CITY     HALIFAX                             I O HALIFAX
ST/CNTY  NC                                 P   NC
ZIP/PST  27839                               27839
COUNTRY

ORDERED BY
ORDER DATE 06/26/03                          TERMS          30
SINGLE/MULTIPLE SHIP DATES (S/M) S           ORDER TYPE P
SHIP DATE  06/26/03                          SHIP VIA      UPS GROUND
CUST P.O.                                       FOB
SPECIAL INSTRUCTIONS                          SLMN1 11      SLMN2 15      SLMN2 %
OVERWRITE LINE ITEM TAX CD
QUOTE#                                           P/O#
A/R CUSTOMER#

(S)ERVICE, (L)ABOR, (M)ANIFEST, (U)SER HIST           ORDER STATUS
ENTER * FOR NEXT ORDER, PI/PO TO PAGE INSTRUCTIONS/ORDER NOTES,
(D)ETAIL LINES, (T)OTALS, RTN FOR NEXT ORDER, (O)THER HEADER INFORMATION ..
    
```

Detail Screen

```

OE12    CW REALTIME SOFTWARE CORP                OPEN ORDER INQUIRY                30 Jun 04

CUST # 14750                HALIFAX FIRE                SLM1 11  ON ORD                0.00
ORDER# 345952                ORD DT 06/26/03  CR LIMIT                A/R BAL                0.00
                                                ORD VAL                3.50

SEQ      QTY  ITEM/MISC                ORD QTY TO  QTY                PRICE                EXTENSION
        ORD'D DESCRIPTION                UOM  SHIP SHIPPED

001 01      1  EON-106035                EA          0                3.50000                3.50
                HOSE BED DIVIDER EXTRUSION

ENTER * FOR NEXT ORDER, P)AGE, PN TO SEARCH PART#, S)ERVICE, L)ABOR, T)OTALS
M)ANIFEST, SEQ FOR DISPLAY, RTN TO REDISPLAY HEADER, MA)RGIN INFO ...
    
```

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Totals Screen

OE12 CW	REALTIME SOFTWARE CORP	OPEN ORDER INQUIRY	30 Jun 04
CUST # 14750	HALIFAX FIRE	SLM111 ON ORD	0.00
ORDER# 345952	ORD DATE 06/26/03	CR LIMIT	A/R BAL 0.00
	TERMS 30	0.000%	ORD VAL 3.50
PRODUCT TOTAL	0.00	LINE ITEM TAX AMOUNT	0.00
DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT	0.00
		-TAXABLE-- TAX	
FREIGHT		ORDER LINE CODE RATE%	TAX AMT
MISCELLANEOUS		Y	
MINIMUM ORDER CHG			
ORDER TAX AMOUNT		0.00 T 7.000% (%/\$)	\$ 0.00
TOTAL TAX AMOUNT	0.00		
ORDER TOTAL	0.00	** PRODUCT TOTAL INCLUDES **	
		BROKEN PKG CHARGES	
		TOTAL OTHER MISC	
ENTER F)UTURE DATING, S)ERVICE, L)ABOR, M)ANIFEST			
ENTER * FOR NEXT ORDER, D)ETAIL LINES, RTN TO REDISPLAY HEADER .			

To inquire on a quote, type **Screen Jump QI** and enter the quote number. The rest of the inquiry screen will be the same as regular sales orders inquiry.

You can also look in Customer Inquiry (**CI**) to find orders or quotes for a specific customer and then go to order or quote inquiry from there.

You can also look in Serial Inquiry (**SI**) to find orders linked to a specific serial number (S/O#), and then go to order inquiry from there.

You can also look in Inventory Inquiry (**II**) to find orders on a specific item number.

SALES ORDERS

D. ORDER AND QUOTE ADJUSTMENTS

Type the Screen Jump **OA** to adjust or make changes to an existing order, or to print a pick ticket. **Type the order #** at the prompt.

```
OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          30 Jun 04

ORDER#  345953
(ENTER '?' TO ENTER/LOOKUP BY OPEN ORDER#)
(ENTER 'T' TO ENTER/LOOKUP BY SERVICE TAG#)
```

Any of the fields with a number to the left can be changed at this screen. The same rules and Lookup options that were used in Order Entry apply here as well. When finished hit **ENTER** to continue.

```
OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          30 Jun 04

ORDER#  345953
CUST#   21420                               SHIP-TO
NAME    GATES CITY FIRE DEPARTMENT        1.    GATES CITY FIRE DEPARTMENT
ADDR 1  P O BOX 874                        2. S  P O BOX 874
ADDR 2                                     3. H T
CITY    GATE CITY                          4. I O GATE CITY
ST/CNTY VA                               5. P  VA
ZIP/PST 24251                             6.    24251
COUNTRY                                     7.

SINGLE/MULTIPLE SHIP DATES (S/M) S
8. ORDER DATE 06/26/03                    13. TERMS 30          NO $ TICKET
9. SHIP DATE 06/26/03 CANCEL              14. ORDER TYPE PD
10. CUST P.O.                              15. SHIP VIA  UPS GROUND
11. ORDERED BY                             16. FOB
12. SPECIAL INSTRUCTIONS                   17. SLMN1 18      SLMN2 15      SLMN2 % 0
                                           18. OVERRIDE LINE ITEM TAX CD
                                           19. A/R-CUSTOMER#
                                           20. FREE FREIGHT      21. STATUS
                                           OPEN TICKETS

ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL,
S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE          ...
```

At the detail screen, you can change quantities and item numbers, or add new lines the same as in order entry. The same options that were available in Order Entry work here as well. **ENTER** to go to the final totals screen.

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OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS			30 Jun 04	
CUST # 21420	GATES CITY FIRE DEPARTMEN		SLM1 18	ON ORD	1,153.54	
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56	
SITE # 01				ORD VAL	26.72	
REM						
SEQ	QTY	ITEM NO.	ORD	QTY TO	PRICE	EXTENSION
		ORD'D DESCRIPTION	UOM	SHIP		
001	1	EON-121334	EA	0	26.72000	0.00
		LAD SLIDE PAD NYLATRON	BIN#			
TEXT						
ENTER SEQ TO CHANGE, (H)EADER, (P)AGE, * TO VOID, RTN TO CONTINUE ...						

Make any changes as needed here. Then **type S** to save or **I** to print pick ticket.

OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS			30 Jun 04
CUST # 21420	GATES CITY FIRE DEPARTMEN		SLM1 18	ON ORD	1,153.54
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56
		TERMS 30	0.000%	ORD VAL	26.72
PRODUCT TOTAL	0.00				
2. DISCOUNT (\$/%)	\$ 0.00			DISCOUNTABLE AMOUNT	0.00
				-TAXABLE-- TAX	
				ORDER LINE CODE	TAX AMT
3. FREIGHT				Y	
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. ORDER TAX AMOUNT			0.00 I	0.000 (%/\$)	\$ 0.00
TOTAL TAX AMOUNT	0.00				
ORDER TOTAL	0.00				
ENTER (F)UTURE DATING, LINE#, (H)EADER, (B)ILL, (C)ASH					
(D)ETAIL, M MIN ORDER CHECK, * TO VOID, S TO POST/SPOOL, I TO POST/PICK S					

If a purchase order is attached to a sales order, you will see a slightly different screen after typing in the order number. It's just a warning that there is a PO link and to be careful with changes to the order. **Type Y** to acknowledge and continue.

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```

OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          30 Jun 04

ORDER#  345958
CUST#   13290                               SHIP-TO
NAME    DAVIS FIRE DEPARTMENT             1.  DAVIS FIRE DEPARTMENT
ADDR 1  2.  S
ADDR 2  P O BOX 29                        3.  H T P O BOX 29
CITY    DAVIS                             4.  I O DAVIS
ST/CNTY NC                               5.  P   NC
ZIP/PST 28524                             6.    28524
COUNTRY 7.
SINGLE/MULTIPLE SHIP DATES (S/M) S
8. ORDER DATE 07/02/03
9. SHIP DATE 07/02/03 CANCEL             14. ORDER TYPE PD          NO $ TICKET

ORDER IS ATTACHED TO P/O# 136872] 'Y' TO ACKNOWLEDGE
*** CHANGES TO SALES ORDER CAN CORRUPT LINKS TO P/O ***

```

To **adjust a quote**, type the **Screen Jump QA** at any menu. The screens will be the same as order adjustments.

```

CQ07A  CW REALTIME SOFTWARE CORP          OPEN QUOTE ADJUSTMENTS          30 Jun 04

ORDER#  112244
CUST#   13270                               SHIP-TO
NAME    DARLINGTON VOLUNTEER             1.  DARLINGTON VOLUNTEER
ADDR 1  FIRE DEPARTMENT                  2.  S   FIRE DEPARTMENT
ADDR 2  2611 HEDGEPEETH ROAD             3.  H T 2611 HEDGEPEETH ROAD
CITY    HALIFAX                          4.  I O HALIFAX
ST/CNTY NC                               5.  P   NC
ZIP/PST 27839                             6.    27839
COUNTRY 7.
SINGLE/MULTIPLE SHIP DATES (S/M) S
8. QUOTE DATE 06/30/03                   13. TERMS 30          NO $ TICKET
9. SHIP DATE 06/30/03 CANCEL             14. QUOTE TYPE Q
10. CUST P.O.                            15. SHIP VIA  UPS GROUND
11. ORDERED BY                           16. FOB
12. SPECIAL INSTRUCTIONS                  17. SLMN1 11  SLMN2 15  SLMN2 %
                                           18. OVERRIDE LINE ITEM TAX CD
                                           19. A/R-CUSTOMER#
                                           20. FREE FREIGHT      21. STATUS

ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL,
(R)ELEASE, S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE          ...

```

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Again, the only difference with quotes is the second screen has the contact information, which you can change if needed. Depending on your Order Type settings, you may not see this screen even for a Quote.

CQ07A	CW REALTIME SOFTWARE CORP	OPEN QUOTE ADJUSTMENTS	30 Jun 04
CUST # 13270	DARLINGTON VOLUNTEER	SLM1 11 ON ORD	
QUOTE# 112244	QUO DT 06/30/03 CR LIMIT	A/R BAL	0.00
		QUO VAL	390.75
1. NAME	DARLINGTON VOLUNTEER	13. CONTACT#	
2. ADDR 1	FIRE DEPARTMENT	14. MR/MS	
3. ADDR 2	2611 HEDGEPEETH ROAD	15. F-NAME	JOHN
4. CITY	HALIFAX	16. M-INIT	
5. STATE	NC	17. L-NAME	FOR
6. ZIP	27839	18. TITLE	FIRE CHIEF
7. INTRO		19. F/B TEXT	
8. STATUS		20. PACKAGE	
9. QUOTE NOTES		21. LEASE CODE	
ENTER LINE#, (A#) FOR ALL, * TO VOID, (H)EADER, OR RTN TO CONTINUE ...			

It is possible to **convert a quote to a sales order** from the Quote Adjustment program, while in the Header (first) screen, **select Line 14** and **change the order type** to the correct one for a sales order, if necessary. You can type ? to display all order types. When this is done, **type R** to release the Quote.

CQ07A	CW REALTIME SOFTWARE CORP	OPEN QUOTE ADJUSTMENTS	30 Jun 04
ORDER#	112244		
CUST#	13270	SHIP-TO	
NAME	DARLINGTON VOLUNTEER	1. DARLINGTON VOLUNTEER	
ADDR 1	FIRE DEPARTMENT	2. S FIRE DEPARTMENT	
ADDR 2	2611 HEDGEPEETH ROAD	3. H T 2611 HEDGEPEETH ROAD	
CITY	HALIFAX	4. I O HALIFAX	
ST/CNTY	NC	5. P NC	
ZIP/PST	27839	6. 27839	
COUNTRY		7.	
SINGLE/MULTIPLE SHIP DATES (S/M) S			
8. QUOTE DATE	06/30/03	13. TERMS	30 NO \$ TICKET
9. SHIP DATE	06/30/03 CANCEL	14. QUOTE TYPE	P
10. CUST P.O.		15. SHIP VIA	UPS GROUND
11. ORDERED BY		16. FOB	
12. SPECIAL INSTRUCTIONS		17. SLMN1 11 SLMN2 15 SLMN2 %	
		18. OVERRIDE LINE ITEM TAX CD	
		19. A/R-CUSTOMER#	
		20. FREE FREIGHT	21. STATUS
ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL, (R)ELEASE , S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE R ..			

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This is your last step before converting the Quote. You can then either **type A** to adjust the quote, or **type C** to convert it to an order.

```

CQ07C  CW REALTIME SOFTWARE CORP          CONVERT QUOTES TO ORDERS      30 Jun 04

QUOTE#  112244
CUST#   13270
NAME    DARLINGTON VOLUNTEER              DARLINGTON VOLUNTEER
ATTN    FIRE DEPARTMENT                   S  FIRE DEPARTMENT
ADDRESS 2611 HEDGEPEETH ROAD              H T 2611 HEDGEPEETH ROAD
CITY    HALIFAX                           I O HALIFAX
STATE   NC                                P   NC
ZIP     27839                             27839
COUNTRY

ENTRY DATE 06/30/03      QUOTE VALUE      390.75
SHIP DATE  06/30/03      OQ BALANCE       390.75
QUOTE DATE 06/30/03      OO BALANCE
CUST P.O.   A/R BALANCE      0.00
TERMS      30              HIGH BALANCE     295.05
SHIP VIA   UPS GROUND      AVG. DAY PAY     21
FOB
ORDER TYPE P              CREDIT LIMIT
SLMN1 11  SLMN2 15  SLMN2%      CREDIT DAYS

ENTER * TO VOID, (A)DJUST QUOTATION, (C)ONVERT TO ORDER      C
PLEASE NOTE!!, ALL QUOTE FIELDS, INCLUDING SHIP DATES, WILL BE CONVERTED
TO SALES ORDERS EXACTLY AS THEY STAND, PLEASE ADJUST/REVIEW IF NECESSARY.
    
```

At the next screen, you will be prompted to accept the quantity to ship for each line item on the quote. You can change it if needed. For example, if this was to be a direct ship to the customer, you would want to change it to 0 so a drop ship PO will be created to send all 3 direct to the customer. If you accept the quantity of 2 here, you will pick those parts from stock and order the one not available.

```

CQ07C  CW REALTIME SOFTWARE CORP          CONVERT QUOTES TO ORDERS      30 Jun 04

QUOTE#  112244

SEQ  SI  QTY  ITEM/MISC          QUO QTY TO  QUANTITY
     QUO'D  DESCRIPTION          UOM  SHIP  AVAILABLE
-----
001  01      3  EON-512004          EA      2      2
      ELEC. CONTROL VACUUM

STOCKING UOM      EA      ON HAND      2
LEAD TIME          COMMITTED    0
OFFSET            BACKORDERED
REPLACED BY PART  AVAILABLE    2
MAKE/BUY CODE     FLOOR STOCK
                  ON ORDER
                  IN STATUS
    
```

When all the lines have been entered, you will **^ to post**.

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CQ07C	CW REALTIME SOFTWARE CORP	CONVERT QUOTES TO ORDERS	30 Jun 04			
QUOTE# 112244						
SEQ	SI	QTY	ITEM/MISC	QUO	QTY TO	QUANTITY
		QUO'D		UOM	SHIP	AVAILABLE
---	---	-----	-----	---	---	-----
001	01	3	EON-512004	EA	2	2
002	01	4	EON-511990	EA	0	
ENTER LINE# TO CHANGE, (P)AGE, ^ TO POST, OR * TO VOID				^ . .		

You will be shown the new order number. **Type I** to print a pick ticket or **ENTER** to finish.

CQ07C	CW REALTIME SOFTWARE CORP	CONVERT QUOTES TO ORDERS	30 Jun 04			
QUOTE# 112244						
SEQ	SI	QTY	ITEM/MISC	QUO	QTY TO	QUANTITY
		QUO'D		UOM	SHIP	AVAILABLE
---	---	-----	-----	---	---	-----
001	01	3	EON-512004	EA	2	2
002	01	4	EON-511990	EA	0	
THE FOLLOWING ORDER NUMBER HAS JUST BEEN CREATED 345956				I		
ENTER ' I ' TO PRINT TICKET OR ANY OTHER KEY TO CONTINUE						

If any other changes need to be made, they will now have to be made in order adjustments (**OA**) using the new order number.

E. BACK ORDER RELEASE

Screen jump BO can be used to release backorders that the system now has stock for. The backorder release process will increase quantities to ship on orders based on stock that is now available in the warehouse. Most sales orders that are linked directly to purchase orders will automatically be released during the receiving process of the purchase order. It is a good idea to run the BO program daily, even if most orders are linked to purchase orders. This program helps find and fill orders that may have fallen through the cracks. After entering **BO**, the following screen will come up:

```
OE09I  MODS BCP-TEST6 COMPANY          AUTOMATIC BACKORDER ALLOCATION    09 Oct 04
      Display of the PROFILE-HEADER table, by Profile
SQ  Profile          Description
  1  REPORT          REPORT ONLY
  2  CUSTOM          CREATE YOUR OWN PROFILE

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# 1....
END OF SEARCH INDEX
```

```
OE09I  MODS BCP-TEST6 COMPANY          AUTOMATIC BACKORDER ALLOCATION    09 Oct 04

      ENTER PROFILE TO USE          REPORT  DESC - REPORT ONLY

1. ENTER CATEGORY                    I
2. ENTER SITE                        X 01
3. ENTER ITEM#                       I
4. ENTER SELECTION                   C 1  REPORT ONLY
```

Prompt 4 has several choices as follows:

```
1 = REPORT ONLY
2 = REPORT AND RELEASE B/O
3 = REPORT, RELEASE, PRINT TICKETS
4 = MANUAL RELEASE
5 = REPORT, RELEASE, RE-PRINT TKTS
6 = RELEASE B/O & PRINT TICKETS
```

Choice 2 will print out a report of orders it thinks it can release. This option is a good option for users who are just getting in started on back-order releasing and want to see what the computer thinks can be released. If this option is used, users must manually go into Order Adjustments (OA) and raise the quantities to ship on the orders.

Choice 2 will print the same report as Choice 1 and at the same time it will raise quantities to ship on the orders. This option will not print any pick tickets so you must use the report to pick and pull orders.

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Choice 3 will do the same things as choice 2, plus the quantity to ship changes on line items of sales orders will print on pick tickets that come out. Users can either use the report or pick tickets to pull parts.

Choice 5. This is similar to choice 3, but the system will print the entire order (not just lines that are just now being allocated). If users use this option they should pull parts using the report that comes out.

SALES ORDERS

F. ORDER SPLIT / DUPLICATE

Type the **Screen Jump OD** to Split an existing order into 2, or make a copy of an existing order. **Type the order #** at the prompt.

```
OE07E  CW REALTIME SOFTWARE CORP          ORDER SPLIT / DUPLICATE          30 Jun 04
ORDER#  345946
(ENTER '?' TO ENTER/LOOKUP BY OPEN ORDER#)
(ENTER 'T' TO ENTER/LOOKUP BY SERVICE TAG#)
```

The normal Header screen will be displayed as a verification step. This is also where you select if you want to Split or Duplicate the order. This example will pick **S** to split.

```
OE07E  CW REALTIME SOFTWARE CORP          ORDER SPLIT / DUPLICATE          30 Jun 04

ORDER#  345946
CUST#   14880                               SHIP-TO
NAME    HARRELLSVILLE FIRE DEPARTMENT     1.  HARRELLSVILLE FIRE DEPARTMENT
ADDR 1  P O BOX 361                        2.  S  1345 Main Street
ADDR 2                                     3.  H T
CITY    HARRELLSVILLE                     4.  I O HARRELLSVILLE
ST/CNTY NC                               5.  P  NC
ZIP/PST 27942                            6.    27942
COUNTRY                                     7.
SINGLE/MULTIPLE SHIP DATES (S/M) S

ORDER DATE 10/08/04                       TAX CODE    T
SHIP DATE  10/08/04 CANCEL                 TERMS      30
CUST P.O.                                     ORDER TYPE  SERV
SPECIAL INSTRUCTIONS                       SHIP VIA    UPS GROUND
FOB
SLMN1 10  SLMN2 45  SLMN2 %  0
OVERRIDE LINE ITEM TAX CD
A/R-CUSTOMER#
OPEN TICKETS

ENTER SPLIT ORDER, DUPLICATE ORDER, OR RTN FOR NEXT ORDER# S
```

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In the following display, the top data is for the original order, and the bottom data is for the new order. You now have the option to change any of the Customer fields. **All changes you make affect only the new order.** **ENTER** to step through the fields, changing data as needed. If you select an Order Type field that requires a serial#, you have the same lookup options as in Order Entry and Adjustments.

OE07E	CW REALTIME SOFTWARE CORP	ORDER SPLIT / DUPLICATE	30 Jun 04
ORDER#	345946 ** ORDER SPLIT **	ORDER DATE 10/08/04	ORDER TYPE SERV
CUST#	14880	SHIP-TO	
NAME	HARRELLSVILLE FIRE DEPARTMENT	1.	HARRELLSVILLE FIRE DEPARTMENT
ADDR 1	P O BOX 361	2. S	1345 Main Street
ADDR 2		3. H T	
CITY	HARRELLSVILLE	4. I O	HARRELLSVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	27942	6.	27942
COUNTRY		7.	
=====			
CUST#	14880.....	SHIP-TO	
NAME	HARRELLSVILLE FIRE DEPARTMENT	1.	HARRELLSVILLE FIRE DEPARTMENT
ADDR 1	P O BOX 361	2. S	1345 Main Street
ADDR 2		3. H T	
CITY	HARRELLSVILLE	4. I O	HARRELLSVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	27942	6.	27942
COUNTRY		7.	
ORDER DATE	10/08/04	8.	ORDER TYPE SERV

The next screen lets you change some additional fields that affect the order pricing and setup. When you call up a field, it will preload with what is on the original order, and any changes affect only the new order. **ENTER** to continue.

OE07E	CW REALTIME SOFTWARE CORP	ORDER SPLIT / DUPLICATE	30 Jun 04
ORDER#	345946 ** ORDER SPLIT **	ORDER DATE 10/08/04	A/R#
14880 HARRELLSVILLE FIRE D --> 14880 HARRELLSVILLE FIRE D			
ORDER TYPE SERV	--> SERV	ORDERED BY	
1. CUSTOMER P/O#			
2. SHIP VIA UPS GROUND			
3. FREIGHT			
4. ORDERED BY			
5. A/R CUST#			
ENTER LINE# TO CHANGE, * TO VOID, S1, S3, OR RETURN TO CONTINUE ..			

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The Next screen shows all the Line Items present on the Order, Page option may be needed to see everything. Each Line item has a flag for whether it stays on the original, or moves the new order.

OE07E CW REALTIME SOFTWARE CORP		ORDER SPLIT / DUPLICATE		30 Jun 04	
				SITE 01	
ORDER#	345946	** ORDER SPLIT **	ORDER DATE 10/08/04	ORDER TYPE	SERV
14880	HARRELLSVILLE FIRE D	--> 14880	HARRELLSVILLE FIRE D	ORDER TYPE	SERV
SEL SEQ	QTY	ITEM/MISC	DESCRIPTION	QTY	QTY PRICE
		ORD'D DESCRIPTION		TO SHIP	SHIP'D
001 001	1	LAB,SUPPLIES	MISC. SERV. SUPPLIES	0	1 0.00
		O --> LINE STAYS ON OLD ORDER			
002 002	1	ADD+ENGINE	ENGINE	0	0.00
		O --> LINE STAYS ON OLD ORDER			
003 003	2	EON-120182	BRACKET	2	11.91
		O --> LINE STAYS ON OLD ORDER			
004 004	4	PUS.T01281	AMBER BOLT ON FILTER	0	6.95
		O --> LINE STAYS ON OLD ORDER			
005 005	4	EON-392501	AMBER BULB	4	27.64
		O --> LINE STAYS ON OLD ORDER			
006 006	4	EON-288033	RED DOME LENS	4	6.69
		O --> LINE STAYS ON OLD ORDER			
ENTER LINE#, P)AGE, S1, S2, SB, * TO VOID, S)POOL, I)NSTANT PRINT 4 ..					

Calling up line **4**, we see how the program allows each line item to be changed. At this prompt **O** is for the Original Order, and **N** is for the New Order.

OE07E CW REALTIME SOFTWARE CORP		ORDER SPLIT / DUPLICATE		30 Jun 04	
				SITE 01	
ORDER#	345946	** ORDER SPLIT **	ORDER DATE 10/08/04	ORDER TYPE	SERV
14880	HARRELLSVILLE FIRE D	--> 14880	HARRELLSVILLE FIRE D	ORDER TYPE	SERV
SEL SEQ	QTY	ITEM/MISC	DESCRIPTION	QTY	QTY PRICE
		ORD'D DESCRIPTION		TO SHIP	SHIP'D
001 001	1	LAB,SUPPLIES	MISC. SERV. SUPPLIES	0	1 0.00
		O --> LINE STAYS ON OLD ORDER			
002 002	1	ADD+ENGINE	ENGINE	0	0.00
		O --> LINE STAYS ON OLD ORDER			
003 003	2	EON-120182	BRACKET	2	11.91
		O --> LINE STAYS ON OLD ORDER			
004 004	4	PUS.T01281	AMBER BOLT ON FILTER	0	6.95
		O --> LINE STAYS ON OLD ORDER			
005 005	4	EON-392501	AMBER BULB	4	27.64
		O --> LINE STAYS ON OLD ORDER			
006 006	4	EON-288033	RED DOME LENS	4	6.69
		O --> LINE STAYS ON OLD ORDER			
004 004	4	PUS.T01281	AMBER BOLT ON FILTER	0	6.95
		O --> LINE STAYS ON OLD ORDER			
ENTER LINE#, P)AGE, S1, S2, SB, * TO VOID, S)POOL, I)NSTANT PRINT 4					

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You can move as many line items as you want to the new order as long as the New Order has at least one Line item, and the Original Order has at least one Line Item.

OE07E	CW REALTIME SOFTWARE CORP	ORDER SPLIT / DUPLICATE	30 Jun 04				
		SITE 01					
ORDER#	345946 ** ORDER SPLIT **	ORDER DATE 10/08/04	ORDER TYPE SERV				
14880	HARRELLSVILLE FIRE D --> 14880	HARRELLSVILLE FIRE D	ORDER TYPE SERV				
SEL	SEQ	QTY	ITEM/MISC	DESCRIPTION	QTY	QTY	PRICE
			ORD'D	DESCRIPTION	TO SHIP	SHIP'D	
001	001	1	LAB,SUPPLIES	MISC. SERV. SUPPLIES	0	1	0.00
			O -->	LINE STAYS ON OLD ORDER			
002	002	1	ADD+ENGINE	ENGINE	0		0.00
			O -->	LINE STAYS ON OLD ORDER			
003	003	2	EON-120182	BRACKET	2		11.91
			O -->	LINE STAYS ON OLD ORDER			
004	004	4	PUS.T01281	AMBER BOLT ON FILTER	0		6.95
			N -->	LINE GOES TO NEW ORDER			
005	005	4	EON-392501	AMBER BULB	4		27.64
			O -->	LINE STAYS ON OLD ORDER			
006	006	4	EON-288033	RED DOME LENS	4		6.69
			O -->	LINE STAYS ON OLD ORDER			
ENTER LINE#, P)AGE, S1 , S2 , SB, * TO VOID, S)POOL, I)NSTANT PRINT ...							

When you are finished type S to Spool (save) or I to Instant Print. You may also enter S1, or S2 to return to Screen 1 or Screen 2.

Order Duplicate works the same way, but you have additional options at the Line Item screen. Choosing to Duplicate the same order we see the following screen. Notice how there are now Qty fields in addition to the Flag option for each line. Again working with Line 4 we make changes.

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OE07E		CW REALTIME SOFTWARE CORP			ORDER SPLIT / DUPLICATE		30 Jun 04	
						SITE 01		
ORDER#	345946	** ORDER DUPLICATE **		ORDER DATE	10/08/04	ORDER TYPE	SERV	
	14880	HARRELLSVILLE FIRE D --> 14880 HARRELLSVILLE FIRE D		ORDER TYPE	SERV			
SEL SEQ	QTY	ITEM/MISC	DESCRIPTION	QTY	QTY	PRICE		
		ORD'D DESCRIPTION		TO SHIP	SHIP'D			
001	001	1 LAB,SUPPLIES	MISC. SERV. SUPPLIES	0	1	0.00		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	1	NEW SHIP QTY		
002	002	1 ADD+ENGINE	ENGINE	0		0.00		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	1	NEW SHIP QTY	0	
003	003	2 EON-120182	BRACKET	2		11.91		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	2	NEW SHIP QTY	0	
004	004	4 PUS.T01281	AMBER BOLT ON FILTER	0		6.95		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	0	
005	005	4 EON-392501	AMBER BULB	4		27.64		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	2	
006	006	4 EON-288033	RED DOME LENS	4		6.69		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	4	
ENTER LINE#, P)AGE, S1, S2, SB, * TO VOID, S)POOL, I)NSTANT PRINT							4	.

The 2 New QTY fields are all you have the option to Maintain.

OE07E		CW REALTIME SOFTWARE CORP			ORDER SPLIT / DUPLICATE		30 Jun 04	
						SITE 01		
ORDER#	345946	** ORDER DUPLICATE **		ORDER DATE	10/08/04	ORDER TYPE	SERV	
	14880	HARRELLSVILLE FIRE D --> 14880 HARRELLSVILLE FIRE D		ORDER TYPE	SERV			
SEL SEQ	QTY	ITEM/MISC	DESCRIPTION	QTY	QTY	PRICE		
		ORD'D DESCRIPTION		TO SHIP	SHIP'D			
001	001	1 LAB,SUPPLIES	MISC. SERV. SUPPLIES	0	1	0.00		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	1	NEW SHIP QTY		
002	002	1 ADD+ENGINE	ENGINE	0		0.00		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	1	NEW SHIP QTY	0	
003	003	2 EON-120182	BRACKET	2		11.91		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	2	NEW SHIP QTY	0	
004	004	4 PUS.T01281	AMBER BOLT ON FILTER	0		6.95		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	0	
005	005	4 EON-392501	AMBER BULB	4		27.64		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	2	
006	006	4 EON-288033	RED DOME LENS	4		6.69		
		D --> LINE DUPLICATED TO NEW ORDER		NEW QTY	4	NEW SHIP QTY	4	
004	004	4 PUS.T01281	AMBER BOLT ON FILTER	0		6.95		
		OLD QTY ORD'D	4	NEW QTY	3	OLD SHIP QTY	0	
						NEW SHIP QTY	3	
ENTER LINE#, P)AGE, S1, S2, SB, * TO VOID, S)POOL, I)NSTANT PRINT							4	

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Regardless of the option you choose.. When you select Spool or Instant Print, you will be asked if you want the system to re-price the Order. Yes or no is up to you. If you gave the original customer some special pricing, you probably want to say no.

```
DO YOU WANT SYSTEM TO RE-PRICE NEW ORDER Y/N?          Y
ENTER LINE#, P)AGE, S1, S2, SB, * TO VOID, S)POOL, I)NSTANT PRINT      S
```

When the New order is created, you will be notified of the new Order Number.

```
RE-PRICING ORDER
ORDER# 345947 HAS BEEN CREATED - HIT ANY KEY
```

SALES ORDERS

G. CUSTOMER CHANGE ON AN ORDER

If you have an open order that was entered with the wrong customer number, you can change it by typing the **Screen Jump COC** for customer order change. Type the order number at the prompt.

```
OE07D  CW REALTIME SOFTWARE CORP          OPEN ORDER CUSTOMER CHANGE   30 Jun 04
ORDER#  345955
```

Type C to change the customer. You will be taken up to the customer number and you can either search with a ?? and name or type the customer number in.

```
OE07D  CW REALTIME SOFTWARE CORP          OPEN ORDER CUSTOMER CHANGE   30 Jun 04

ORDER#  345955
CUST#   22380
NAME    LAFAYETTE VILLAGE FIRE DEPT      1.      LAFAYETTE VILLAGE FIRE DEPT
ADDR 1  307 HOPE MILLS ROAD              2. S    307 HOPE MILLS ROAD
ADDR 2                                     3. H T
CITY    FAYETTEVILLE                   4. I O  FAYETTEVILLE
ST/CNTY NC                               5. P    NC
ZIP/PST 28304                            6.      28304
COUNTRY                                     7.
SINGLE/MULTIPLE SHIP DATES (S/M) S

ORDER DATE 06/26/03
SHIP DATE  06/26/03 CANCEL
CUST P.O.  MARK
SPECIAL INSTRUCTIONS

TAX CODE   Z
TERMS      30
ORDER TYPE PD
SHIP VIA   UPS NEXT DAY AIR
FOB
SLMN1 17   SLMN2 15   SLMN2 %
OVERRIDE LINE ITEM TAX CD
A/R-CUSTOMER#
OPEN TICKETS

ENTER LINE#, * TO VOID, (C)USTOMER#,
R TO REPRICE, S TO POST/SPOOL, I TO POST/PICK      C..
```

Realtime Software Corporation - Sales Order Manual

You will now be asked if you want to re-price the order. If you've given the customer a special pricing different than regular pricing, then don't reprice. You will usually use this more with an order that was first entered under the customer, but then turned into a warranty. Warranty pricing is generally different than customer pricing. **Type R** if you want to reprice, then **S** to save or **I** to print.

OE07D	CW REALTIME SOFTWARE CORP	OPEN ORDER CUSTOMER CHANGE	30 Jun 04
ORDER#	345955		
CUST#	21530	SHIP-TO	
NAME	LADY SMITH VOL. FIRE DEPT	1.	
ADDR 1	P O BOXC 53	2. S	
ADDR 2		3. H T	
CITY	LADY SMITH	4. I O	
ST/CNTY	VA	5. P	
ZIP/PST	22501	6.	
COUNTRY		7.	
SINGLE/MULTIPLE SHIP DATES (S/M) S			
ORDER DATE	06/26/03	TAX CODE	I
SHIP DATE	06/26/03 CANCEL	TERMS	30
CUST P.O. MARK		ORDER TYPE	PD
SPECIAL INSTRUCTIONS		SHIP VIA	UPS NEXT DAY AIR
		FOB	
		SLMN1	22 SLMN2 15 SLMN2 %
		OVERVERRIDE LINE ITEM TAX CD	
		A/R-CUSTOMER#	
		OPEN TICKETS	
ENTER LINE#, * TO VOID, (C)USTOMER#,			
R TO REPRICE, S TO POST/SPOOL, I TO POST/PICK R ..			

SALES ORDERS

H. BILLING

1. BILLING PROGRAM

If you have a large stack of pick tickets that need to be billed, it is generally easier to use the **billing program** instead of order adjustments. Type the **Screen Jump BILL** at any menu. The date will default to today's date but can be changed. If it is month end but you haven't closed yet, and you want to bill on July 1, but treat it as June, you could change the date shipped and invoice date back to June 30. **ENTER** through the dates.

```
BL03A  CW REALTIME SOFTWARE CORP          SHIPMENT ENTRY          30 Jun 04
        ENTER DATE SHIPPED 06/30/04
        ENTER INVOICE DATE 06/30/04

*** NOTE - SHIPMENT ENTRIES WILL AFFECT THE OPEN ***
*** ORDER FILE - RUN OPERATOR OVERRIDES IN ***
*** ORDER ENTRY FIRST IF REPORT IS NEEDED ***
```

Type the order number at the prompt. If you get the message at the bottom of the screen that this is a **drop ship order, do not bill through this program**. The inventory must be received on the purchase order and billed from there. See Section G 2. of the Purchase Order Manual. Type * (asterisk) to void out of this order.

```
BL03A  CW REALTIME SOFTWARE CORP          SHIPMENT ENTRY          30 Jun 04

ORDER#  345952

ENTER 'Y' TO CONTINUE TO INVOICE THIS DROP SHIP ORDER *
345952 - IS LINKED TO P/O# 136876 YOU MAY WANT TO BILL VIA P/O RECEIVING
```

Type the next order number at the prompt.

```
BL03A  CW REALTIME SOFTWARE CORP          SHIPMENT ENTRY          30 Jun 04

ORDER#  344413
```


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```

BL03A  CW REALTIME SOFTWARE CORP          SHIPMENT ENTRY          30 Jun 04
ORDER#  344413
CUST#   18780          * SHIP-TO NAME AND ADDRESS *
NAME    SHARPSBURG FIRE PREVENTION ASC    SHARPSBURG FIRE PREVENTION ASC
ADDR 1  PREVENTION ASSOCIATION            PREVENTION ASSOCIATION
ADDR 2  P O BOX 275                       P O BOX 275
CITY    SHARPSBURG                        SHARPSBURG
S/C Z/P NC          27878          NC          27878
COUNTRY
ORDER DATE  03/14/03          7. CUST P.O.
1. DATE SHIPPED 06/30/03      8. SHIP VIA          UPS GROUND
2. INVOICE DATE 06/30/03      9. FOB
3. DISC DATE   06/30/03      10. TOTAL WEIGHT
4. DUE DATE    07/30/03      11. SLMN1 11  SLMN2 30  SLMN2%
5. TERMS CODE  30
ORDER TYPE P          12. A/R CUSTOMER#
OVERRIDE LINE ITEM TAX CD  13. SPECIAL INSTRUCTIONS
6. PICKING TICKETS RECV
OUTSTANDING 001 002
INVOICE NUMBER 430304 .
ENTER LINE TO CHANGE, B TO BILL, * TO VOID, T FOR TOTALS, RTN TO CONTINUE B
    
```

If freight needs to be added to an order before billing, do not type B to bill at the first screen. **Type T** for totals to go to the final screen. Then **type 3** to add freight.

```

BL03A  CW REALTIME SOFTWARE CORP          SHIPMENT ENTRY          30 Jun 04

CUST#   11130          TOWN OF AHOSKIE          SLM1 23  ON ORD          49.38
ORDER#  344327          ORD DT 03/13/03  CR LIMIT          A/R BAL          241.35
INVOICE# 430306          TERMS 30  0.000%          ORD VALUE          49.38

PRODUCT TOTAL          49.38

2. DISCOUNT ($/%) $          DISCOUNTABLE AMOUNT          49.38
-TAXABLE-- TAX
ORDER LINE CODE  RATE%          TAX AMT
3. FREIGHT
4. MISCELLANEOUS
5. MINIMUM ORDER CHG
6. INVOICE TAX AMOUNT          49.38 T          7.000 (%/$) $          3.46

TOTAL TAX AMOUNT          3.46

INVOICE TOTAL          52.84

ENTER (C)ASH, (F)UTURE DATING, (I)NSTANT, LINE# * TO VOID, ^ TO POST 3
    
```

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When billing from the totals page, you will not be prompted with the invoice number at the bottom of the screen. You must **write down the invoice# before ^ to post**. If you forget to write it down, you can go to **OI** (order inquiry), pull up the order#, **type O** for other header information, and you will see the invoice# there.

BL03A CW REALTIME SOFTWARE CORP		SHIPMENT ENTRY		30 Jun 04	
CUST# 11130	TOWN OF AHOSKIE	SLM1 23	ON ORD	49.38	
ORDER# 344327	ORD DT 03/13/03	CR LIMIT	A/R BAL	241.35	
INVOICE# 430306	TERMS 30	0.000%	ORD VALUE	49.38	
PRODUCT TOTAL		49.38			
2. DISCOUNT (\$/%) \$		DISCOUNTABLE AMOUNT		49.38	
		-TAXABLE-- TAX			
		ORDER LINE CODE	RATE%	TAX AMT	
3. FREIGHT		4.45	Y		
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. INVOICE TAX AMOUNT		53.83 T	7.000 (%/\$)	\$	3.77
TOTAL TAX AMOUNT		3.77			
INVOICE TOTAL		57.60			
ENTER (C)ASH, (F)UTURE DATING, (I)NSTANT, LINE# * TO VOID, ^ TO POST ^					

SALES ORDERS

H. BILLING

2. ORDER ADJUSTMENTS

To bill orders through order adjustments, type the **Screen Jump OA** at any menu. This program allows you to make changes if needed and then bill from the Totals screen. You will be prompted for the order number. Make any necessary changes by selecting the line number. In this case the customer has given us a PO number, which was needed in order to invoice them.

OE07A	CW REALTIME SOFTWARE CORP	OPEN ORDER ADJUSTMENTS	02 Jul 04
ORDER#	345953		
CUST#	21420	SHIP-TO	
NAME	GATES CITY FIRE DEPARTMENT	1. GATES CITY FIRE DEPARTMENT	
ADDR 1	P O BOX 874	2. S P O BOX 874	
ADDR 2		3. H T	
CITY	GATE CITY	4. I O GATE CITY	
ST/CNTY	VA	5. P VA	
ZIP/PST	24251	6. 24251	
COUNTRY		7.	
SINGLE/MULTIPLE SHIP DATES (S/M) S			
8. ORDER DATE	06/26/03	13. TERMS 30	NO \$ TICKET
9. SHIP DATE	06/26/03 CANCEL	14. ORDER TYPE	P
10. CUST P.O.	H35022	15. SHIP VIA	UPS GROUND
11. ORDERED BY		16. FOB	
12. SPECIAL INSTRUCTIONS		17. SLMN1 18 SLMN2 15 SLMN2 % 0	
		18. OVERRIDE LINE ITEM TAX CD	
		19. A/R-CUSTOMER#	
		20. FREE FREIGHT	21. STATUS
		OPEN TICKETS	
ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL, 10			
S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE . . .			

ENTER to continue to the item detail screen. If no changes are necessary, **ENTER** to continue to the Totals screen.

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OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS			02 Jul 04	
CUST # 21420	GATES CITY FIRE DEPARTMEN		SLM1 18	ON ORD	1,153.54	
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56	
SITE # 01				ORD VAL	26.72	
REM						
SEQ	QTY	ITEM NO.	ORD	QTY TO	PRICE	EXTENSION
		ORD'D DESCRIPTION	UOM	SHIP		
001	1	EON-121334	EA	1	26.72000	26.72
		LAD SLIDE PAD NYLATRON	BIN#			
ENTER SEQ TO CHANGE, (H)EADER, (P)AGE, * TO VOID, RTN TO CONTINUE ...						

Select the line number to make any changes. You may need to add freight or change the sales tax code. **Type BILL** and **ENTER** to bill the order.

OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS			02 Jul 04	
CUST # 21420	GATES CITY FIRE DEPARTMEN		SLM1 18	ON ORD	1,153.54	
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56	
		TERMS 30	0.000%	ORD VAL	26.72	
PRODUCT TOTAL	26.72					
2. DISCOUNT (\$/%) \$	0.00			DISCOUNTABLE AMOUNT	26.72	
				-TAXABLE-- TAX		
				ORDER LINE CODE	RATE%	TAX AMT
3. FREIGHT				Y		
4. MISCELLANEOUS						
5. MINIMUM ORDER CHG						
6. ORDER TAX AMOUNT			26.72	I	0.000 (%/\$)	\$ 0.00
TOTAL TAX AMOUNT	0.00					
ORDER TOTAL	26.72					
ENTER (F)UTURE DATING, LINE#, (H)EADER, BILL , (C)ASH (D)ETAIL, M MIN ORDER CHECK, * TO VOID, S TO POST/SPOOL, I TO POST/PICK BILL						

You can also **type C** for cash from this screen if the customer has come in to pick up an existing order and is paying for it right then. This will automatically invoice the order, and post the payment to the invoice at the same time. See the **next section F 3** for further instruction on this feature.

You will then be prompted with the printer for the invoice. **ENTER** at the default printer name, and then note the invoice number to write on your pick ticket.

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BL03A CW REALTIME SOFTWARE CORP		SHIPMENT ENTRY		02 Jul 04	
CUST# 21420	GATES CITY FIRE DEPARTMEN SLM1 18			ON ORD	1,153.54
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56
INVOICE# 430307	TERMS 30 0.000%			ORD VALUE	26.72
PRODUCT TOTAL		26.72			
2. DISCOUNT (\$/%) \$	0.00		DISCOUNTABLE AMOUNT		26.72
			-TAXABLE-- TAX		
			ORDER LINE CODE	RATE%	TAX AMT
			Y		
3. FREIGHT					
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. INVOICE TAX AMOUNT	26.72 I		0.000	(%/\$) \$	0.00
TOTAL TAX AMOUNT		0.00			
INVOICE TOTAL		26.72			
PRINTER AINVOICE ACTIVEFAX INVOICE COPIES 1					
ENTER NEW PRINTER, ? FOR DISPLAY OF ALL PRINTERS, OR RETURN TO CONTINUE					

BL03A CW REALTIME SOFTWARE CORP		SHIPMENT ENTRY		02 Jul 04	
CUST# 21420	GATES CITY FIRE DEPARTMEN SLM1 18			ON ORD	1,153.54
ORDER# 345953	ORD DT 06/26/03	CR LIMIT		A/R BAL	101.56
INVOICE# 430307	TERMS 30 0.000%			ORD VALUE	26.72
PRODUCT TOTAL		26.72			
2. DISCOUNT (\$/%) \$	0.00		DISCOUNTABLE AMOUNT		26.72
			-TAXABLE-- TAX		
			ORDER LINE CODE	RATE%	TAX AMT
			Y		
3. FREIGHT					
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. INVOICE TAX AMOUNT	26.72 I		0.000	(%/\$) \$	0.00
TOTAL TAX AMOUNT		0.00			
INVOICE TOTAL		26.72			
*** INVOICE# 430307 HAS BEEN CREATED - ANY KEY TO CONTINUE ***					

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You can also use a feature called future dating if the customer is allowed to have a payment plan such as half due now, half in 30 days, or the payment split in thirds due 30/60/90, etc. Future Dating can be set up however you want it. It can either be done in order adjustments, at the time the order is first entered, or at the time the order is billed.

SALES ORDERS

H. BILLING

3. ORDER ENTRY

You can also bill an order from order entry (**OE**). This is usually used for walk in customers that do not have an existing order. Enter their order and if they are a charge customer, at the final totals screen **type BILL** to bill. If they are paying for their purchase right then, **type C** for cash.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	02 Jul 04
CUST # 21060	CALLANDS VOL. FIRE DEPART	SLM1 16	ON ORD
ORDER# 345957	ORD DT 07/02/03	CR LIMIT	A/R BAL
	TERMS 30	0.000%	ORD VAL 25.53
PRODUCT TOTAL	25.53		
2. DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT	25.53
		-TAXABLE-- TAX	
		ORDER LINE CODE	RATE% TAX AMT
3. FREIGHT		Y	
4. MISCELLANEOUS			
5. MINIMUM ORDER CHG			
6. ORDER TAX AMOUNT	25.53	I	0.000 (%/\$) \$ 0.00
TOTAL TAX AMOUNT	0.00		
ORDER TOTAL	25.53		** PRODUCT TOTAL INCLUDES **
			BROKEN PKG CHARGES 0.00
			TOTAL OTHER MISC
ENTER (F)UTURE DATING, (H)EADER, BILL , (C)ASH			
LINE TO CHANGE, (D)ETAIL, * TO VOID, S TO POST/SPOOL, I TO POST/PICK C			

A payment screen will display and you can **type ?** to see what cash code to use. **Select the appropriate cash code** and **ENTER**.

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OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	02 Jul 04
CUST # 21060	CALLANDS VOL. FIRE DEPART	SLM1 16 ON ORD	
ORDER# 345957	ORD DT 07/02/03 CR LIMIT	A/R BAL	
	TERMS 30 0.000%	ORD VAL	25.53
PRODUCT TOTAL	25.53		
2. DISCOUNT (\$/%)	\$ 0.00	DISCOUNTABLE AMOUNT	25.53
		-TAXABLE-- TAX	
		ORDER LINE CODE RATE%	TAX AMT
3. FREIGHT		Y	
4. MISCELLANEOUS			
5. MINIMUM ORDER CHG			
6. ORDER TAX AMOUNT	25.53 I	0.000 (%/\$)	\$ 0.00
ENTER PAYMENT METHODS, DESCRIPTIONS, AND AMOUNTS [^ = PAGE]			
CASH CODE	?		
CHECK#/CASH			
DESCRIPTION			
--BALANCE--	25.53	ORD TOTAL	25.53
		ORD VAL	25.53

Select the correct cash code.

1	CA	CASH PAYMENTS
2	CC	CREDIT CARD
3	CHK	CHECK PAYMENTS

Fill in the rest of the information. Description can be used for whatever purpose you choose. If the cash code is a credit card, you can type VISA, MC, etc. You can set up the cash codes however you would like through background table maintenance.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	02 Jul 04
CUST # 21060	CALLANDS VOL. FIRE DEPART	SLM1 16 ON ORD	
ORDER# 345957	ORD DT 07/02/03 CR LIMIT	A/R BAL	
	TERMS 30 0.000%	ORD VAL	25.53
PRODUCT TOTAL	25.53		
2. DISCOUNT (\$/%)	\$ 0.00	DISCOUNTABLE AMOUNT	25.53
		-TAXABLE-- TAX	
		ORDER LINE CODE RATE%	TAX AMT
3. FREIGHT		Y	
4. MISCELLANEOUS			
5. MINIMUM ORDER CHG			
6. ORDER TAX AMOUNT	25.53 I	0.000 (%/\$)	\$ 0.00
ENTER PAYMENT METHODS, DESCRIPTIONS, AND AMOUNTS [^ = PAGE]			
CASH CODE	CHK		
CHECK#/CASH	538663		
DESCRIPTION	D.L.#		
	25.53	NN.NN	
--BALANCE--	25.53	ORD TOTAL	25.53
		ORD VAL	25.53

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Notice how the balance goes to zero after entering the amount. Make sure this amount is zero before you leave this Payment window. **ENTER** to continue. If you need to change anything with cash, **type C**. Otherwise **^ to invoice** the order. At the printer prompt, **ENTER** to print the invoice and to display the invoice number.

OE03A CW REALTIME SOFTWARE CORP		ORDER ENTRY		02 Jul 04	
CUST # 21060	CALLANDS VOL. FIRE DEPART	SLM1 16	ON ORD		
ORDER# 345957	ORD DT 07/02/03	CR LIMIT	A/R BAL		
	TERMS 30	0.000%	ORD VAL	25.53	
PRODUCT TOTAL	25.53				
2. DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT		25.53	
		-TAXABLE-- TAX			
		ORDER LINE CODE	RATE%	TAX AMT	
3. FREIGHT		Y			
4. MISCELLANEOUS					
5. MINIMUM ORDER CHG					
6. ORDER TAX AMOUNT	25.53	I	0.000 (%/\$)	\$	0.00
ENTER PAYMENT METHODS, DESCRIPTIONS, AND AMOUNTS [^ = PAGE]					
CASH CODE	CHK	538663	D.L.#	25.53
CHECK#/CASH					
DESCRIPTION					
ENTER 'C' TO CHANGE CASH, ^ TO INVOICE, OR ANY OTHER KEY					
	0.00	ORD TOTAL	25.53	ORD VAL	25.53

AR04C CW REALTIME SOFTWARE CORP		CUSTOMER CASH RECEIPTS ENTRY		02 Jul 04		
CUST# 21060	CALLANDS VOL. FIRE DEPARTMENT	PAYMENT DATE		06/30/03		
OPEN INV	0.00	CREDIT DAYS		A/R BAL		
				25.53		
				CREDIT LM		
CHECK#/CASH 538663	\$ AMOUNT	TOTAL TO APPLY		25.53		
CHECK DATE		REMAIN'G TO APPLY		0.00		
	NMBR REF NO	DATE	AMT DUE	TERM	\$/% DISCOUNT	AMT PAID
ENTER						
	001 430308	30 Jun 04	25.53	30		25.53
	430308	30 Jun 04	25.53	30		25.53
*** INVOICE# 430308 HAS BEEN CREATED - ANY KEY TO CONTINUE ***						

This same process of posting the payment at the same time as invoicing can be done when in order adjustments (**OA**). Just **type C** for cash instead of **BILL** to bill. This process from Order Adjustments would be for customers who already have existing orders and are coming to pick them up and will pay for them then.

SALES ORDERS

I. REPORTS

1. OPEN ORDERS

To print an open order report, type the **Screen Jump OOR** at any menu. **Select the number** of the profile you want to use and **ENTER**.

```

OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT 02 Jul 04
      Display of the PROFILE-HEADER table, by Profile
SQ  Profile      Description
 1  ALL          ALL OPEN SALES ORDERS
 2  DEAN         DEAN'S OPEN ORDER REPORT

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# 1....
END OF SEARCH INDEX
    
```

At the profile detail screen, you **can select a line number** to change any of the printing parameters as needed. If you make changes and want to save the profile as a new profile, **type S** to save and **assign a different name and description** to the profile. If you want to run the profile as is, **type Y** and then **ENTER** at the printer prompt to run the report.

```

OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT 02 Jul 04

 0.  ENTER PROFILE TO USE      ALL      DESC - ALL OPEN SALES ORDERS

 1.  ENTER SELECTION-----]    2  BY SITE BY CUST#
 2.  ENTER CATEGORY
 3.  ENTER SITE
 4.  ENTER ITEM#
 5.  ENTER DEPARTMENT
 6.  ENTER ORDER TYPE
 7.  ENTER SALESMAN 1
 8.  ENTER DATE RANGE          TO
 9.  ENTER CUSTOMER#
10.  ENTER CUSTOMER CLASS
11.  ENTER PGC
12.  PRINT ITEM DESC ON 2ND LINE    Y  YES
13.  QTY TO SHIP > 0 (Y/N)        Y  YES
14.  ORDER STATUS CODE            C

ENTER #, S)AVE PROFILE, * TO VOID, OR 'Y' TO EXECUTE Y.
    
```

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There are actually quite a few Open Order Reports on the system. If you type SOE08 from any menu, you will see the main Order Reporting menu.

SCREEN CW REALTIME SOFTWARE CORP	Open Order Reports	02 Jul 04
10 CWW		DS
SOE08	ENTER SELECTION NUMBER:	13:10:37
HS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
DETAIL	1	Inventory Detail Open Orders
	2	Misc Charges Detail Open Orders
	3	To-Be-Shipped Date Detail Open Orders
Summary	4	Summary Open Orders
	5	Open Order WIP Report
	6	Detail Open Orders Report With Options
	7	Fill Rate Report
	8	Summary Service Open Orders Report
	9	Future Order Report
	10	Detail Open Order Quantity Status Report
	11	Booked Orders Report

Option 6 on this menu is the same report as the OOR Screen Jump.

The main Difference between Report #6 and Report #10 is that Report 6 has more Dollar amount information per order whereas Report#10 is more quantity heavy (# On order, # Available, # on Backorder etc). Take some time and run these reports and see which options and which reports work best for your business needs.

Report 11 will show the value of all orders entered for a date range, regardless of whether they shipped or not.

Report #7, the Fill Rate Report is pretty flexible in it's selection criteria, and is meant to help identify high and low fill rate percentages on a per order / per part basis.

Report #8 shows "header information" for service orders, but no line items.

Report #5 shows WIP cost values on open orders for those users having labor and non-stock parts go through a WIP G/L account.

SALES ORDERS

I. REPORTS

2. PRINT INVOICES FROM BILLING PROGRAM

When billing sales orders through the billing program, invoices will not print after each order is billed. They will accumulate until the print program is run. This is typically done at the end of the day or the beginning of the next day. All orders that have been billed since the last invoice print was done will be included in this printing. Type the **Screen Jump PRINT** (or SBIL, #4) at any menu.

Select the number of the profile you want to use and **ENTER**.

```

BL04  CW REALTIME SOFTWARE CORP          INVOICE PRINT          02 Jul 04
      Display of the PROFILE-HEADER table, by Profile
SQ   Profile          Description
  1  RT-DA            DAILY - ALL BY CUST#
  2  CUSTOM          CREATE YOUR OWN PROFILE

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# 1....
END OF SEARCH INDEX
    
```

At the profile detail screen, you **can select a line number** to change any of the printing parameters as needed. If you make changes and want to save the profile as a new profile, **type S** to save and **assign a different name and description** to the profile. If you want to run the profile as is, **type Y** and then **ENTER** at the printer prompt to run the report.

```

BL04  CW REALTIME SOFTWARE CORP          INVOICE PRINT          02 Jul 04

      ENTER PROFILE TO USE          RT-DA  DESC - DAILY - ALL BY CUST#

1. ENTER CUSTOMER CLASS
2. CHOOSE SORTING OPTION          #      SORT BY CUSTOMER NUMBER
3. DEPARTMENT
4. PRINT FORMS ALIGNMENT          N      NO

Select #, S)AVE, OR 'Y' TO EXECUTE
    
```

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If you try to run the Invoice print, and there are no invoices waiting to be printed, you will be notified on the screen.

```
NO INVOICES WERE SELECTED, ANY KEY TO EXIT .
```

When Invoice printing is complete, you will be asked to verify that the Invoices printed, and are correct. If everything looks good, **Type Y** at the acceptable prompt. **If you have a printer jam or something, then you would want to answer N, which** will take you back to a menu to start the print program again.

```
BL04  CW REALTIME SOFTWARE CORP          INVOICE PRINT          02 Jul 04
      ** INVOICE PROCESSING COMPLETED **
      ARE INVOICES ACCEPTABLE? (Y/N)  Y
```

Because this program has profiles, you can set it up to run in Batch. See the Administration Manual for more details on Batch options and Setup.

Batches of Invoices may be run throughout the course of a Day. There is an End of the Day Register to accommodate for this. Some users prefer to run this manually; others prefer it in the batch. That is up to the system Administrator.

I. REPORTS

3. INVOICE HISTORY REPORTS

If you type **SBL10** you will see a menu specifically for Invoice History Reports.

```

SCREEN CW REALTIME SOFTWARE CORP          Detail Invoice / History Rep. 02 Jul 04
10 CWW                                     DS
SBL10                                ENTER SELECTION NUMBER:          13:10:37
HS
      FUNCTION                NMBR          DESCRIPTION
                                0   Select Printer
                                1   Detail Invoice / History Reports
                                2   Summary Invoice / History Reports
                                3   Summary Sales Reports
    
```

All 3 of these reports work with Report Profiles, which allow you to save your choices, and run the reports in Batch. Again, see the Administration Manual for more details on Batch.

Options for the Detail Invoice / History Report (Choice 1 on Menu)

```

BL10A  CW REALTIME SOFTWARE CORP          A/R INVOICE/HISTORY REPORTS    02 Jul 04
      ENTER PROFILE TO USE          RT-ME-C  DESC - MONTH-END - BY CUST# BY INV#
1. ENTER SELECTION                  C  9    BY CUST# BY INV#
2. ENTER DEPARTMENT                 I
3. ENTER SITE                        I
4. ENTER ITEM#                       I
5. ENTER ORDER TYPE                 I
6. ENTER SALESMAN 1                 I
7. ENTER DATE RANGE                 R S  CPSD 02/01/04 TO S CPED 02/29/04
8. ENTER CUSTOMER#                  I
9. ENTER CUSTOMER CLASS              I
10. ENTER PRODUCT GROUP CODE         I
11. ENTER (C)URRENT OR (H)ISTORY     C C    CURRENT
12. ENTER CATEGORY                   I
13. ENTER SALESMAN2                  I
14. PRINT COST/GP/GP%                C Y    YES
15. ENTER INVOICE #

Select #, S)AVE, DEL)ETE PROFILE, T)ERMINAL, E)XPORT, OR 'Y' TO EXECUTE ...
    
```

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Options for the Summary Invoice / History Report (Choice 2 on Menu)

BL10B	CW REALTIME SOFTWARE CORP	A/R INVOICE/HISTORY REPORTS	02 Jul 04
ENTER PROFILE TO USE RT-ME-S DESC - MONTH-END - BY SALESMAN			
1.	ENTER SELECTION	C 1	BY SALESMAN
2.	ENTER DEPARTMENT	I	
3.	ENTER SITE	I	
4.	ENTER ITEM#	I	
5.	ENTER ORDER TYPE	I	
6.	ENTER SALESMAN 1	I	
7.	ENTER DATE RANGE	R S CPSP 02/01/04 TO S CPED 02/29/04	
8.	ENTER CUSTOMER#	I	
9.	ENTER CUSTOMER CLASS	I	
10.	ENTER PRODUCT GROUP CODE	I	
11.	ENTER (C)URRENT OR (H)ISTORY	C C	CURRENT
12.	ENTER CATEGORY	I	
13.	ENTER SALESMAN2	I	
14.	PRINT COST/GP/GP%	C Y	YES
15.	RAISE COST BY PERCENT	X	
16.	COMMISSION PERCENTAGE	X	
Select #, S)AVE, DEL)ETE PROFILE, OR 'Y' TO EXECUTE			
...			

Options for the Summary Sales Report (Choice 3 on menu)

BL10C	CW REALTIME SOFTWARE CORP	SUMMARY SALES REPORTS	02 Jul 04
ENTER PROFILE TO USE RT-ME-S DESC - MONTH-END BY SALESMAN			
1.	ENTER SELECTION	C 3	BY SALESMAN
2.	ENTER SITE	I	
3.	ENTER DATE RANGE	R S CPSP 02/01/04 TO S CPED 02/29/04	
4.	ENTER CUSTOMER CLASS	I	
5.	ENTER PRODUCT GROUP CODE	I	
6.	ENTER DEPARTMENT	I	
7.	ENTER ORDER-TYPE	I	
8.	ENTER (C)URRENT OR (H)ISTORY	C	
Select #, S)AVE, DEL)ETE PROFILE, OR 'Y' TO EXECUTE			
...			