Orders

Name: _____

Orders

Creating Orders

Creating a Fixed Price (Straight Price) PO

1. From the Main Menu; go to Dealers → Orders → New Order
2. Select "Yes" to create a Purchase Order
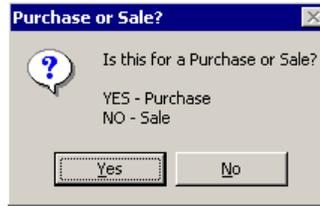
3. Select the Company.

4. Click on .
5. Select for a firm order. (With the correct permissions a Firm Order can be changed to a Quote and vice versa)

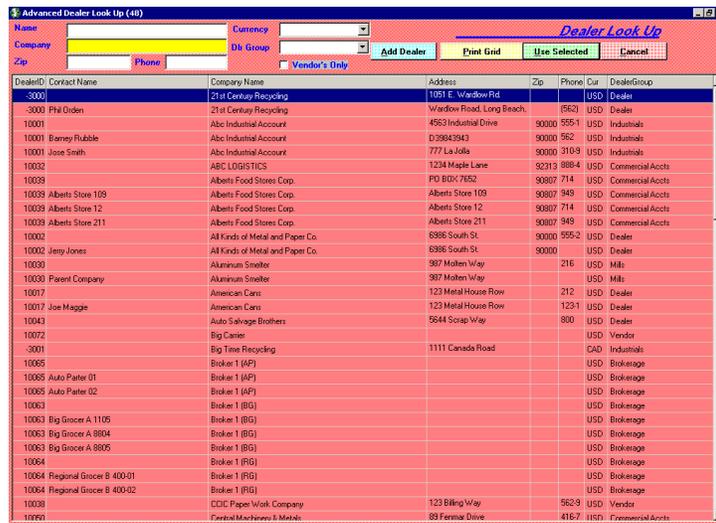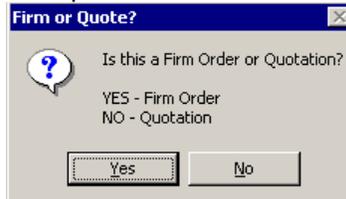1051 E. Wardlow Road • Long Beach, CA 90807 • (562) 981-1030/FAX (562) 981-1040

6. Complete at least the "Info" tab and add items, their price and other information.

7. Once complete, click on **Save** and **Close**.

Info Tab
1. Complete all applicable information on the "Info" tab.
   - By- Pulls from "primary contact" field on dealer profile screen (This pulls from customer profile or dropdown).
   - Terms- Terms are pulled from the default set on the dealer information screen. Terms can be changed for each individual order.
   - Customer Ref # (Mostly used on Sales Orders)
   - Shipping Term- Delivery point including Freight on Board (FOB).
   - Delivery- Delivery locations. Click on the "Locations" button to add additional locations to the dropdown list. Enter a "Delivery" address if differs from the primary address
   - Yard Shipment Ship To- Pulls from the Dealer list
   - Deliv # (if required- manually entered)
   - Shipped via- How the item is shipped, such as truck or barge
   - Entered By- Is populated with the logged in user's id. This field is locked.
2. Enter the "Item" and "Price" information.
   - Item
   - Override Name-Will be provided on printouts and follows the item thru to scale tickets, invoices, etc. for this order (What your vendor calls the material)
   - Packaging- Type
   - PU/Delivered- Internal information for how the item is delivered: using our trucks, their trucks or both
   - Amount Ordered- In weight being ordered- LB, tons, metric tons, etc.
   - Containers- Number and type. The number is important when doing bookings.
   - Variance Allotment +/- -What percentage over or short the order can be. This is for reference only.
3. Add an additional item, duplicate a selected item and/or mark an item as "Closed" as necessary by click on the respective buttons.

Freight Tab

1. To add a freight charge on a PO, click on the "Freight" tab and then on "New".
2. Complete all relevant information.
   a. Vehicle Type
   b. Amount-Enter the dollar amount to charge the supplier.
   c. Notes-For additional internal freight notes.
   d. Requirements- If applicable, enter the minimum and maximum number of runs, empty run and additional run and their penalties if applicable

Fees and Services Tab

1. To add a fee on a PO, click on the "Fees/Services" tab and then on "New Fee/Service".
2. Add the fee and description. For example a blank processing fee for the entire order.

Notes/Letter Tab

1. To add notes, click on the "Notes/Letter" tab.
2. "Add a Blank Note" or "Add a Common Note"
   • The note can be added to the
     o Header (not item specific)
     o Detail
     o Footer (not item specific)
   • The note can be:
     o Internal-not visible on external printouts
     o Popup-when someone opens the order, the note pops up- Only pops up on detail shipping ticket
     o Item-extension of the item description
     o Units-extension of the quantity notes, containers, etc.
   • Type the note in the box.
3. Once complete, click on "Save Note".
4. Additionally, documents can be attached to the order by clicking on "Attach Documents"

Price Lists Tab

Price lists are listed for reference only. Information cannot be changed on this tab.

Traffic Info Tab

This will auto populate the booking with this order is selected.

1. If known, enter traffic information regarding weights, delivery and time of contact.
2. Complete all other information on the various tabs as necessary.
3. Save, Print and Close when complete.

Expenses Tab

This is recommended to only be done at scale ticket level.

1. Click on "Expenses" and "Quick Add Expense".
2. Enter the vendor, type, item and price per unit and other applicable information
3. Click on "Create Expense".
4. The expense is now listed on the "Expenses Tied to Transaction" tab.

Advances Tab

It is not recommended that this be done here as a dealer settlement must be done.

1. Click on the "Advances" tab and on "New".
2. Complete the following required fields: "Advance Type" and "Advance Amount". All other fields are optional. The advances are listed.
3. Save and Close

Order Closing Tab

1. Complete or close the entire order or reopen the order if necessary.

Creating a Fixed Price (Straight Price) SO

1. From the Main Menu; go to Dealers → Orders → New Order
2. Select "No" to create a Sales Order.

3. Select the Company.

4. Click on **Use Selected**.
5. Select **Yes** "Yes" for a firm order.

6. Complete all information for the Sales Order in the same manner as detailed for completing a Purchase Order.

Creating a Provisional Price PO

1. To create a Provisional Price PO, use the same steps for creating a Fixed Price PO or SO except select "Formula" under "Base Price".
2. Choose of these 4 options:
    a. Price List-Pull price from company entered price list.
    b. Market indicators-Use market price lists. The list given has been loaded by your company. Include the applicable day for the list such as "first day of the month", "average for the month", etc.
    c. 30 day average sales price-Average price for all orders for that item within your system.
3. Optional: Once the price is entered, select "if indictor price less than" and enter a price.
    a. Add a 1st calculation to be applied to the indicator price.
    b. Add a 2nd calculation to be applied to the indicator price or indicator price plus the first calculation.
    c. Allow Negative Minimum Value.
    d. Provide minimum and maximum values allowed for these calculations.
4. Add Provisional price and Unit of Measure to be used on provisional payment or invoice
5. Check box to show price vs. formula.

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Info Tab

1. Complete all applicable information on the "Info" tab.
   - By- Pulls from "primary contact" field on dealer profile screen (This can be changed to the Buyer or Seller).
   - Terms- Terms are pulled from the default set on the dealer information screen. Terms can be changed for each individual order.
   - Customer Ref #
   - Shipping Term- Delivery point including Freight on Board (FOB).
   - Delivery- Delivery locations. Click on the "Locations" button to add additional locations to the dropdown list. Enter a "Delivery" address if differs from the primary address
   - Yard Shipment Ship To- Pulls from the Dealer list
   - Deliv #
   - Shipped via- How the item is shipped, such as truck or barge
   - Entered By- Is populated with the logged in user's id. This field is locked.

2. Enter the "Item" and "Price" information.
   - Item
   - Override Name-Will be provided on printouts and follows the item thru to scale tickets, invoices, etc. for this order
   - Packaging- Type
   - PU/Delivered- Internal information for how the item is delivered: using our trucks, their trucks or both
   - Amount Ordered- In lb, tons, metric tons, etc.
   - Containers- Number and type. The number is important when doing bookings.
   - Variance Allotment +/- -What percentage over or short the order can be. This is for reference only.

3. Add an additional item, duplicate a selected item and/or mark an item as "Closed" as necessary by click on the respective buttons.

Item selection

- Item – select from the drop down list, it will appear in the list when you click on a different field
- Override Name- type in the override name, it will appear on the purchase ticket and any other customer paperwork associated with this order
- Packaging- select from the drop down list

Pricing

- Select straight price, formula price or elemental price
- Price per unit of measure- select a unit of measure for the price from the drop down list
- The information will appear in the list above, once it is entered.

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Weight detail

- Minimum Weight Required
- Maximum weight
- Amount- Type in the weight ordered and select units of measure from the drop down list

- If minimum weights are required on a load, you can pass on these costs to the customer. (This pertains to international shipments, in most instances.) Using Charge type, amount and billing cycle choices.
- Please read notes on the right hand side of this screen

Freight tab

1. To add a freight charge on a PO, click on the "Freight" tab and then on **New**.
2. Complete all relevant information.
   a. Charges tab- Enter dollar amount (vehicle type is optional) and application of freight charges (per ticket, per month or per unit of measure)

   b. Amount-Enter the dollar amount to charge the supplier.
   c. Freight Tax – Select box, tax item and amount
   d. Notes-For additional internal freight notes.
   e. Requirements- If applicable, enter the minimum and maximum number of runs, empty run and additional run and their penalties if applicable

(Mostly used on Purchase Orders)

Fees / Services Tab

1. To add a fee on a PO, click on the "Fees/Services" tab and then on **New Fee / Service**.
2. Add the fee and description. For example a Bin Rental fee for the entire order.

Notes/ letters tab

1. To add notes, click on the "Notes/Letter" tab.
2. **Add Blank Note** or **Add Common Note**
   - The note can be added to the
     - o Header (not item specific)
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   - The note can be:
     - o Internal-not visible on external printouts
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     - o Item-extension of the item description
     - o Units-extension of the quantity notes, containers, etc.
   - Type the note in the box.
3. Once complete, click on **Save Note**.
4. Additionally, documents can be attached to the order by clicking on **Attach Documents**.
   - Footer Notes- Appear at the bottom of the Order printout

Price Lists Tab

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Traffic Info Tab

1. If known, enter traffic information regarding weights, delivery and time of contact.
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Expenses Tab

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Advances Tab

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1. Click on the "Advances" tab and on New.
2. Complete the following required fields: "Advance Type" and "Advance Amount". All other fields are optional. The advances are listed.
3. Save and Close

Order Closing Tab

Complete or close the entire order or reopen the order if necessary.

1. Save the order by pressing "Save" button and a screen with options to print will appear:

The detailed order is a ROM report and identical to the office copy, but it has prices.

2. Click "Close" to close screen
3. How to make a new order – "New" or "Copy to New"