



21st Century Programming

Custom Software Solutions for the Recycling Industry

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

Orders

Name: _____



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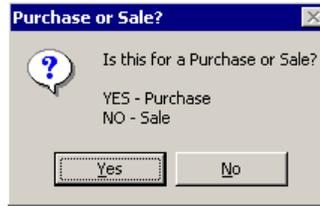
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Orders

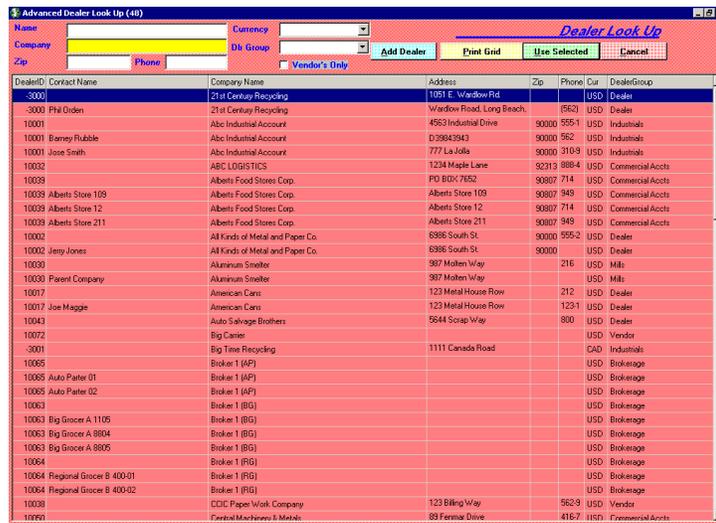
Creating Orders

Creating a Fixed Price (Straight Price) PO

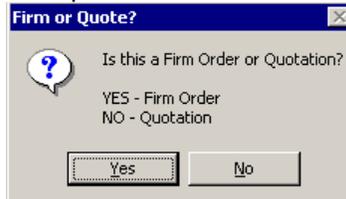
1. From the Main Menu; go to Dealers → Orders → New Order
2. Select "Yes" to create a Purchase Order



3. Select the Company.



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





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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

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



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Freight Tab

- To add a freight charge on a PO, click on the “Freight” tab and then on “New”.
- Complete all relevant information.
 - Vehicle Type
 - Amount-Enter the dollar amount to charge the supplier.
 - Notes-For additional internal freight notes.
 - 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

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

Notes/Letter Tab

- To add notes, click on the “Notes/Letter” tab.
- “Add a Blank Note” or “Add a Common Note”
 - The note can be added to the
 - Header (not item specific)
 - Detail
 - Footer (not item specific)
 - The note can be:
 - Internal-not visible on external printouts
 - Popup-when someone opens the order, the note pops up- Only pops up on detail shipping ticket
 - Item-extension of the item description
 - Units-extension of the quantity notes, containers, etc.
- Type the note in the box.
- Once complete, click on “Save Note”.
- 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.

ShortName	A CUSTOMERS (10161) USD	B CUSTOMERS (10149) USD	C CUSTOMERS (10162) USD	AMM Ferrous (10154) USD	COMEX (10159) USD	Iron Age USD
#1 HMS				155		150
#1 Mixed				130		105
#1 Unp				135		130
#2 HMS				120		120
#2 UNP				100		100
2024	0.52	0.41	0.21			
300 St/St	0.38	0.26	0.1			
300 Tgs	0.37	0.3	0.12			
356Wheels	0.6	0.5	0.39			
6061	0.62	0.49	0.39			
6063 CLN	0.62	0.49	0.39			
6063 PTD	0.42	0.32	0.3			



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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.



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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.

Purchase or Sale?

Is this for a Purchase or Sale?

YES - Purchase
NO - Sale

Yes No

3. Select the Company.

Advanced Dealer Look Up (40)

Dealer Look Up

Name: [] Company: [] Currency: []
Company: [] DR Group: []
Zip: [] Phone: []
Vendor's Only: Add Dealer: [] Print Grid: [] Use Selected: [] Cancel: []

DealerID	Contact Name	Company Name	Address	Zip	Phone	Cur	Dealer Group
3000	PHL Orden	21st Century Recycling	1051 E. Wardlow Rd		(562) 981-1030	USD	Dealer
10001	ABC Industrial Account	ABC Industrial Account	4563 Industrial Drive	90000	555-1212	USD	Industrial
10001	Banney Rubble	ABC Industrial Account	038843943	90000	562-555-5555	USD	Industrial
10001	Jose Smith	ABC Industrial Account	777 La Jolla	90000	310-907-9000	USD	Industrial
10032	ABC LOGISTICS	ABC LOGISTICS	1234 Maple Lane	92313	888-455-8512	USD	Commercial Accts
10039	Alberts Store 109	Alberts Food Stores Corp.	PO BOX 7652	98007	714-556-8998	USD	Commercial Accts
10039	Alberts Store 12	Alberts Food Stores Corp.	Alberts Store 109	98007	949-523-1111	USD	Commercial Accts
10039	Alberts Store 211	Alberts Food Stores Corp.	Alberts Store 12	98007	714-888-9999	USD	Commercial Accts
10002	All Kinds of Metal and Paper Co.	All Kinds of Metal and Paper Co.	8886 South St.	90000	555-2565	USD	Dealer
10002	Jerry Jones	All Kinds of Metal and Paper Co.	8886 South St.	90000		USD	Dealer

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

Firm or Quote?

Is this a Firm Order or Quotation?

YES - Firm Order
NO - Quotation

Yes No

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

Material Order (330)

Order No. 35426 Sale Order Change APPROVED

Company/Contact: 21st Century Recycling PHL Orden
Override Contact: Scale/Broker All Items
Order Group: 0

Order Date: 9/9/2010 Expires/Due By: 10/9/2010
Terms: Net 30 Days
Cust Ref#: []
Shipping Term: 0
Delivery: 21CP
Yard Shipers Ship To: 0
Deliv #: []
Shipped via: 0
Entered By: 21cp
Currency Info: Currency: USD Exchange Rate: 1

Market	Date	Value	Unit	Exp By
AMM	7/6/2006	0.8500	LB	21cp
Any Market Indicator	7/6/2006	2.0000	LB	21cp
Comex	7/6/2006	3.2500	LB	21cp
LME	7/6/2006	2.545.0000	MTon	21cp
Midwest Factory Bund	7/6/2006	75.0000	Ton	21cp
Paper Market	7/6/2006	0.0500	LB	21cp
Platts	7/6/2006	1.2500	LB	21cp

Item (Override) Packaging Pricing Notes
-<SELECT> Loose \$0.0000 per LB

Item/Price Information Weight Finalized Pricing Schedule Weight Distributions Linked Orders Advanced

Item: -<SELECT> Base Price
Override Name: Straight Price Straight Price: \$0.0000
Packaging: Loose Price Unit of Measure: LB
PU / Delivered: Both PU & Delv
Amount Ordered: 0 LB
Containers: 0
Variance Allotment +/-: 0.00 %
Add CRV Value to Price
Department: Sales



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Creating a Provisional Price PO

Material Order (330)

Order No. 15426 Sale Order **APPROVED** ...

Company / Contact: 21st Century Recycling Phil Orden Scale/Broker: All Items Order Group: 0

Info | Freight | Fees/Services | Notes/Letter | Price Lists | Traffic Info | Expenses | Advances | Order Closing

Order Date: 9/9/2010 By: 0

Expires/Due By: 10/9/2010

Terms: Net 30 Days

Cust Ref#:

Shipping Term: 0

Delivery: 21CP

Yard Shipment Ship To: 0

Deliv #:

Shipped via: 0

Entered By: 21cp

Latest Market Information:

Market	Date	Value	Unit	Ent.By
AMM	7/6/2006	0.8500	LB	21cp
Any Market indicator	7/6/2006	2.0000	LB	21cp
Cornex	7/6/2006	3.2500	LB	21cp
LME	7/6/2006	2,545.0000	M Ton	21cp
Midwest Factory Bund..	7/6/2006	75.0000	Ton	21cp
Paper Market	7/6/2006	0.0500	LB	21cp
Platts	7/6/2006	1.2500	LB	21cp

Currency Info: USD Exchange Rate: 1

Item (Override)	Packaging	Pricing	Notes
298	Loose	AMM -	

Item/Price Information | Weight | Finalized Pricing Schedule | Weight Distributions | Linked Orders | Advanced

Item: 298

Override Name:

Packaging: Loose

PU / Delivered: Both PU & Deliv

Amount Ordered: 0 LB

Containers: 0 0

Variance Allotment +/-: 0.00 %

Base Price:

Straight Price

Formula

Elemental

Hide Price on Printout

Provisional Price: \$ 0.0000

Price List: Display Calculated Price instead of Formula when printed. (Price List only)

Market Indicator: AMM Round to Nearest Dollar: NO Rounding

30 Day Avg Sales Price: 1st of Month

If Indicator Price Less Than: \$0.0000 LB Allow Negative Minimum Value

1st Calc: Add \$ 0 LB Min. Price: \$0.0000 LB

2nd Calc: Add \$ 0 LB Max. Price: \$0.0000

Department: Sales

Individual Printouts: to Screen Multi Recips.

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 indicator 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

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 - 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.
- 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.
- 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 (Override)	Packaging	Pricing	Notes
<SELECT>	Loose	\$0.0000 per LB	

- 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.



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Notes/ letters tab

- To add notes, click on the "Notes/Letter" tab.
- Add Blank Note** or **Add Common Note**
 - The note can be added to the
 - Header (not item specific)
 - Detail
 - Footer (not item specific)
 - The note can be:
 - Internal-not visible on external printouts
 - Popup-when someone opens the order, the note pops up (only pops up on detail shipping ticket)
 - Item-extension of the item description
 - Units-extension of the quantity notes, containers, etc.
- Once complete, click on **Save Note**.
- 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

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

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#1 Mixed				130		105
#1 Unp				135		130
#2 HMS				120		120
#2 UNP				100		100
2024	0.52	0.41	0.21			
300 St/St	0.38	0.26	0.1			
300 Trgs	0.37	0.3	0.12			
356Wheels	0.6	0.5	0.39			
6061	0.62	0.49	0.39			
6063 CLN	0.62	0.49	0.39			
6063 PTD	0.42	0.32	0.3			

Traffic Info Tab

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

Expenses Tab

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

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



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Advances Tab

Not recommended that this is 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

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”