Basic Technique for Customer Order Sales

The Customer Order screen can seem a little overwhelming when first viewed. There is an enormous amount of data associated with this screen. Much of the information you see is either stored in a different module and linked to the order or is "informational" data only.

A basic Customer Order may only require minimal input and may consist of nothing more than entering a customer on the Header page, adding a book on the Detail page and taking tenders. More complex orders may involve backordered items, multiple shipments and deposits.

> Special Note: A word about defaults. Some of the fields we will discuss are default settings that have been determined during your original setup. They are being mentioned here because their settings can have a profound effect on the Customer Order process. You may change the default behaviors by accessing the appropriate screens (Vendor, Taxes, etc.) and making the changes there.

1. Open Customer Order by selecting the Sales | Customer Order menu option.
2. Click the F4 New CO button on the toolbar.

First let's fill in the Header page information. As mentioned above, not all fields are necessary and many will be populated from other files, such as the customer's address, tax and discount information.

3. Enter a customer name in the customer field or click the ellipsis button  to launch the Customer Assistant screen. Once a customer is selected the tax and discount profile fields are populated based on the customer selected.

    1. Tax profile: this field will default to the tax profile you have assigned to the chosen customer in their customer record. If you have not assigned a tax profile to the customer the default tax profile will be used. Please refer to Tax Profile Configuration and Tax Table Configuration topics for more information. You may change the tax information for this order only without affecting either the default tax behavior or the customer's record. Choose a different profile from the drop down list or leave it as is if the current settings are correct.
    2. Discount profile: this field will default to the Customer Discount profile, if any, you have assigned to the customer in their customer record. You may change this information

without affecting the default discount behavior. This discount will apply to all items sold on the current order.

4. Ship via: is a reference field that displays the method of shipment to be used for the Customer Order. Setting a value here will have no effect on how the order is shipped - that is, it is not linked to the ship method file and therefore shipping charges will not be applied.

Special Note: Orders generated from an AWS web site will already have the ship via field filled in. Remember - the web customer has the option of selecting the method of shipment they desire at the time of the order.

5. Terms: will default to the terms, if any that have been assigned to the chosen customer in their customer record.
6. Pro forma Invoice: having this option selected allows an invoice to be created for the purpose of being "quote" or "proposal".
7. Allow BO: this is an important field. If left unchecked all items not shipped will be canceled. The default setting is checked (allow BO) when Visual Anthology ships. You may choose to change the default (See Customer Order options for detailed information) or change the current setting. Remember changing the current setting will have no affect on the default setting.
8. Allow partial shipments: this field is informational (e.g. it will not stop you from shipping partial orders)
9. Shipping address: this information should be populated from the customer's file. You need only to make any necessary edits. If no data appears first check the customer file - the shipping information may not exist.

Move to the Details page. Most of the customer information comes over to the next page. This section is used to enter the sale items.

Auto-fill Ship and Backorder quantities: sets the default behavior of the Customer Order screen to automatically check inventory levels to see if the item is in stock and shippable. This check is made at the time of order creation and is not updated at the time the order posts. It is possible to post an order and find that the item is not on-hand. Therefore there is no substitute for actually "picking" the books before posting. This is the only sure way to know that an item is on-hand.

10. ISBN/SKU: Scan the book you want to sell. If the item is located in the inventory file the field will populate. If not the inventory assistant will load and you will need to select the title.
11. Ord: this field specifies the number of items to be ordered. Enter a value here and press enter.

12. Ship: if auto-fill is on this field will be populated based on the current onhand quantity in the inventory file. If not you will need to enter a value here. Remember that ship quantities can not exceed order quantities.
13. BO: this is a calculated field (e.g. Ord - Ship = BO). The value of the order and ship fields determine the value of the backorder field.
14. Price: this field is automatically populated by information supplied from the inventory table. You may edit this field to either increase or decrease the price of an item. Any change made here will have no affect on the original record in inventory.
15. Disc%: this allows you to discount an item on a line by line basis. This will overwrite any existing discounts - it does not add to them. As mentioned before Customer Discounts apply to all items on the order.
16. Pressing the return button adds the line to the detail grid.

Repeat 10 - 16 to add additional books.

17. When you are ready to finalize the order you will need to take tenders (receive payment). Click the F3 Tenders button.
18. Select the method of payment. The information in this display is found in the Tenders screen. See Setting Up Tenders for detailed information. Selection is made by double-clicking on the desired method. Selection is shown by a checkmark next to the chosen method.
19. The amount field is populated with the total for the sale. Visual Anthology is assuming that the customer is paying with the correct change. If you are taking a greater amount than is due - enter that amount here (e.g. Total due $8.95 and the customer gives you $10).
20. Visual Anthology asks if you want to post - this means finalize the order. Remember that posting does not mean ship. You need to post the order so the tenders will be part of the Ztape information at the end of day. This action also commits the items in inventory as being sold which reduces the on hand quantities accordingly.
21. Visual Anthology next asks if you want to ship the items being sold. Remember if you have items on the order that are being backordered you may want to hold the order until all items have been received. You also have the option to ship a partial order - this will be discussed in the next section. For now lets assume all orders are ready to be shipped and answer yes.

Remember that once these defaults are set to your liking, many of the steps above will be eliminated. If the results are not what you expected - first look at the default settings. Often times these are the culprit.