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Stock Control & Order Processing Software Solution

USER GUIDE

2008

Blue-Logic

Stock Control & Order Processing Software Solution <u>CONTENTS</u>

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How to create a customer

- 1. Click on **Customer Details** on the left of your screen.
- 2. Click on the icon situated at the top of your screen: **New Customer** this will bring up a smaller window where you can type in all the details.
- 3. When you have entered all the details, you can choose to either create an order on completion, or open the customer details, by ticking the either of the two boxes.
- 4. Before exiting this screen make you sure you have ticked the business client box (if applicable) as this depicts how the customer is shown, either as a business client or as a home customer. Click **Finished**.

New Customer	
New Custon	ner Details :
Company Name :	Business Client
Company Reg :	VAT No:
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Mobile Number :	
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How to edit customer details

- 1. To edit customer details open the customer you want to edit by double clicking the customer.
- 2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save to keep the amendments.

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Note: Customers can be put into groups, e.g. Wedding Supplies, this is very useful when targeting mailshots. Click on the **Group Membership** tab and either select or add a new group to the list.

How to use the customer search function

The search function is very useful when you are trying to locate an existing customer. With customers you have two search options, either **Search** or **Advanced Search**.

<u>Search</u>

- 1. Go into the customer details screen, click on the **Search** tab.
- 2. Choose if you want to search for the **Company Name** etc, by ticking the relevant boxes. Type in the information you have for the company name e.g. "int" for "International Services".
- 3. Click on the **Search** button and the results will show company names with "int" in the title.
- 4. Click on the company name for example and the details screen will appear for that customer.



Advanced Search

- 1. Go into the customer details screen, click on the Advanced Search tab.
- Choose if you want to search for customers who are in a Customer Group etc, by ticking the relevant boxes. When you have ticked on the relevant box, choose which Customer Group you wish to search for, e.g. Weddings Supplies & Services.
- 3. Click on the **Search** button and the results will show the customers in that particular group.
- 4. Click on the customer you want and the details screen will appear for that customer.

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Customer details screen step-by-step

- 1. Select **customer details** icon on the main screen, search for the customer (or create new) then choose **contact** icon on the left of the screen. This brings up another screen, which allows you to create and store letters, record telephone calls etc.
- 2. At the bottom of the screen there are five icons, which allow you to create either :-
 - **New Telephone** this is a small box for recording telephone calls etc, it also appears automatically when tapi is activated.
 - **New Letter** this allows you to create letters using templates to populate names, addresses etc. Choose the **Document Template** from the drop down list, then just merge this to your document. There are several options you can use to generate your letter, e.g. print, email, fax.
 - New Reminder this allows you to set sales calls reminders etc.
 - New Appointment please see the "How to create an appointment".

Customer - Pocklington Boiler S	iervice Ltd - Contact :
Customer - Pocklington Boiler S Customer Details Customer Details Addresses Contact Invoices Contact Con	ervice Ltd - Contact : Contact : Telephone Letters E-Mails All Contact
Create New Order Customer Service Customer Service Al Requests Create New Request	
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- New Callout – please see the "How to create a callout".

How to create a CRM document

- 1. To create a letter template, click on **Groups/Setup** on the left of your screen, and then click on **CRM Documents**.
- 2. Click on **New Document** and you can either type in the white area and then save the document, or insert the mergefields required, e.g. customer name and address, and then write the content of the letter.
- 3. Save as draft and test print the letter before clicking on send. Letters can be e-mailed, faxed or printed out.



How to send out marketing material

- 1. To send a printed mailshot to several customers, go into the **Customer Details** screen and select the customers by ticking them.
- Click on the Select Customers drop down menu at the top of your screen, highlight and click on Send Letter to Selected, this brings up the CRM Document window where you select a template letter. The customer details will then be populated with the correct mergefield data and then the letters can be printed out.
- 3. To send an e-mail mailshot to several customers, the procedure is the same as above, but highlight and click **Send E-mail** in the drop down menu and select the **CRM Document** you want to send, click ok and the clients details will be populated into the mergefields specified.

Note:

You can also create a group of customers to send specific mailshots to, go into the **Customer Details** screen, click on the **Select Customers** drop down menu, then **Add to Group** this will add all of the selected to a group already created.

How to take a telephone order

- 1. Answer call.
- 2. If tapi function is activated the customer details screen will appear. If tapi is not activated, click on **customer details** on the main screen and search for their name. If they are a new customer click on **customer** details on the main screen, then **add new customer**.
- 3. Double click on the correct customer, which will bring up the **customer details** screen.
- 4. If they are a new customer click on **customer** details on the main screen, then **add new customer** (at the top of your screen) this brings up a blank details screen. Fill in all the boxes then either click on :-
 - **Open Customer on Completion**. This will allow you to create a callout or an appointment by opening the customer details screen, and then select the contact icon on the left of the screen.
 - **Open Order on Completion**. This will allow you to create an order for a product, this option should be used for price enquiries of products, all orders can also be saved as quotations here.

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Please note: The full instructions on how to take an order are under "How to create an order" found on page 7 of this User Guide.

How to create an order

- 1. To create an order or to enquire about a product or price, click on the **Customer Details** icon on the left of your screen and search for your customer.
- 2. Choose **Orders** from the icons on the left. This brings up another window that shows all the order history/status for that customer, and also allows you to **Create New Order**.
- 3. Click on the icon at the bottom of the screen.
- 4. Another window appears called **New Customer Order Wizard**, which takes you through the ordering process and allows delivery information to be changed as required, or a default address if no change.
- 5. Click next to bring you to the Order Lines screen.



- 6. The product code is entered here, or click search to bring up the **Products Search** screen, which allows you to find products using keywords. Template orders can be used at this point just select from the drop down list and load. You can create new templates from this screen as well as loading ones already made.
- Click next to enter any additional details. NOTE Payment method drop down menu must be set to On Account if you do not wish to take a payment immediately.
- 8. Click finish to finish the order and create picking lists and purchase orders for stock if necessary.
- 9. Alternatively you can just save the order as a quote by clicking Save as Quote icon at the bottom of any of the three screens in the Wizard at any time. This can be used for any enquiries or product price checks that a customer has called about. It can be recalled at any time and an order will not be processed until approved.



How to create an appointment/callout

New Appointment

This option is used to create an on site meeting but does <u>not</u> charge time etc.

- 1. Clicking on the **New Appointment** icon takes you straight into the diary, which brings up a list of employees.
- 2. You can choose an employee and date, then click and stretch the box to fit the time you wish to allocate. (This option is used for non chargeable meetings/appointments only).
- 3. Another screen will then appear called **new schedule event** where you can enter details of the appointment.
- 4. Click finish to complete the appointment.

New Callout

This option is used for creating jobs and job sheets etc, where time can be charged.

- 1. Clicking on the **New Callout** icon takes you straight to the diary page, but shows only the employees that are set up in **Employee Configuration** as able to do callouts.
- 2. You just choose an employee and date then click and stretch the box to fit the time you wish to allocate.
- Another screen will appear then called **new schedule event** this allows you to enter details of the job and the time charge to be used on this job. (Note – you cannot finish this screen unless you have completed the above two tasks)
- 4. You can also pick a serviced item from the list of ones at this address, and also pick the default address or another address from the drop down menu. (Note you must have previously added all the serviced items at this address and all customer addresses in the Customer Details addresses screen).
- 5. These details will then appear on the job sheet for the employee to see.
- 6. Click finish to complete the callout.



How to take a credit card payment

- 1. When the customer wants to pay for an order by credit card, go into the order and on the **Additional Details** screen, choose Credit Card in the drop down Payment Method menu.
- 2. Fill in the credit card details in the Payment Details box.
- 3. Click Finish, the payment will be taken instantly from the customer's card.

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How to import/validate a web order

- 1. Go into the **Customer Orders** icon on the left of your screen. Then click on the **Import Web Orders** button at the top of the menu. This brings up the validation screen.
- 2. Click on the **Load File** button on the left of your screen. This brings up all Web Orders to enable you to validate them.
- 3. When you have finished the validation process just press Import Orders.

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Load File					Import Orders
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When you click **Import Orders** it takes you through a Wizard to **Validate Web Order**.

Follow the instructions on the 3 screens, when you come to the 3rd screen and everything is correctly entered click **Validate Order**.

How to ship delivered orders

- 1. Go into the **Picking Lists** icon on the left of the main screen.
- If the customer has paid by credit card tick Awaiting Picking/Order Completed. Click on the order you want to ship and click Release for Picking. Tick Awaiting Payment Confirmation then follow steps 4 – 7.
- If the customer has paid by cheque or on account tick Ship Account Order. Click on the order you want to ship and a screen will appear called Despatch Delivered then follow steps 4 – 7.
- 4. You can either scan with your scanning tools, the barcodes of the items you are sending, or you can type the product codes in. If a product code is not found you can also search for the product using the search wizard keywords etc.
- 5. When you have finished click **Complete and Pay** at the bottom of the screen, this brings you to the next window called **Ship Order**. This screen allows you to see order lines and total order value.
- 6. To complete the process you must then click on either Free of Charge Delivery or enter an amount charge. (This is extra to work time and is added to total order value).
- 7. When you have set the delivery charge, the icon on the bottom right allows you to **Ship Goods** to complete the order.

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				Total Value of This Ost	e.;	\$31,73		
				Opening Balance :		\$249.90	Use Balanc	
	8			Despatch Note Value :		831,73		
Destination Country Inst Don't send Parcel Force	ructions : e to Northern Iseland	Isle of Man, Isles of Scily	Highlands 🥎	Adjustment Value :	F	0	Discourt	•
PA20-49, PA60-78, PH	17-25. PH30-44, 2E	H21-25, IV, H5, KA27-28	.KW.	New Balance :		\$201.63		
	Paid By :	On A/C		Cheque / Cash Value :	Г	1		
							15 - 51	14
×								2
Charles Martin America							Sh	p Goode

How to ship posted orders

- 1. Go into the **Picking Lists** icon on the left of the main screen.
- If the customer has paid by credit card tick Awaiting Picking/Order Completed. Click on the order you want to ship and click Release for Picking. Tick Awaiting Payment Confirmation then follow steps 4 – 7.
- If the customer has paid by cheque or on account tick Ship Account Order. Click on the order you want to ship and a screen will appear called Despatch Delivered then follow steps 4 – 7.
- 4. You can either scan with your scanning tools, the barcodes of the items you are sending, or you can type the product codes in. If a product code is not found you can also search for the product using the search wizard keywords etc.
- 5. When you have finished click **Complete and Pay** at the bottom of the screen, this brings you to the next window called **Ship Order**. This screen allows you to see order lines and total order value.
- Choose the shipping method e.g. 1st Class Post, then you can either Accept Estimated Delivery or enter your own postage cost in Delivery Charge For This Shipment.
- 7. When you have set the postage cost, the icon on the bottom right allows you to **Ship Goods** to complete the order.

Ship Order	Ship Order		
Payment Authorisation :	Order Id : 1639 Payment A	uthorisation :	Order Id: 1639
Customer Name: Live Tradit Live Tradit Live Tradit Analize Tecnologie Overflo Schedul 5 Analize Tecnologie 139 1010 Till br decire all 5 Analize Tecnologie 139 1100 Till br decire all 5 Analize Tecnologie 130 1100 Till br decire all 5 Analize Tecnologie 130 1203.50 5 Analize Tecnologie 130 130.50	Customer N Product Description 00750 1100	Iame : n Quartity Distance Qrity Despatched Line Status vobal eneral 5 5 115/ electric dat 5 5	Und Sel Pice Live Total Awaleg Dequich (10.50 Awaleg Dequich (50.00 E50.56
Incide Address: Special Foreign / Delwey Address: Special Inductions / Value Carded Curr Lynched Lawy Upweider Lawy	Throade Address	Shipping / Delivery Address Lynsted Lane	Special Inductory / Woh Carriel Out
United United Simplowers Kert Kert HEY 011 United Flights United Flights		Lynted Lyneled Sittingbourne Sittingbourne Kert Kert MES ORL MES ORL United Kingdon United Kingdon	
Stephol Method: Career Stephol Method: Career Stephol Method: Career Stephol Method: Career	Free DI Dusge Dekrey Shipping Method Shipping Addees Second Extended Dekrey Second	Int Class Post Packing Instructions Packing Instructions	Delivey Drage Fit This Shipment: 155 Fine Of Driving Delivery Estimated Delivery Drage £15.00 (Zccopt Catavaled Delivery) Total Value of This Order £296.60
Productions Control Control C	75.02 Use Dalance 36.03 Destination Counts 0 (Discount Destination Counts Don't send Placed	Instructions. Face to Northern Instand, Lake of Man, Takes of Solly, Highlands	Opening Balance 6276.02 [] Use Balance Dispatch Nule Value 6256.03 Adjustmeet Value 6 [] [Discourt •
New Balance Packets Machine HT M, Hard An HS, Addrau M, Packets Machine HT M, Hard AN, HS, Addrau M, Packets Machine HT M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, Machine HT, M, Hard AN, HS, Addrau M, Packets M, P	0 Pk20-43, Pk60-75	Paid By : On A/C	New Balance : E509.33 Deque / Cush Value
Character	Ship Goods		Ship Goods

How to invoice using multiple orders

- 1. From the main menu, click on the **Invoicing** icon, then tick the title **Orders Waiting to Invoice**, this brings up all the orders currently not invoiced yet.
- 2. Highlight all the orders you wish to group together (**Select only the same customer**) onto one invoice by ticking each one.
- 3. Right click and select Raise Invoice.

PLEASE NOTE – order lines cannot be de-selected after you have raised an invoice, so the same customer must be correct at that point.

7 - Blue Logic								
Close Refre	3 esh List Pay Se	PCY elected Invoices	Print Selected I	nvoices Pri	nt Statements	Generate DD File		
Invo Orders Waitin	ice Histo	ory : Sear	ch s C Due In	voices	C Late In	voices C Com	npleted C	Paid CAI
Order Number :	- Order Date :	Tille -	Forename	Sumame	Company	ame :	Order Value	Total Order Val
2679	Mar 13 2008 3	:08PM Mr	Richard	Wilks	Abco Safel	U U	£92.83	£92.83
2678	Mar 12 2008 7	:18PM Ms	Vicky	Hirst	Static Solu	ions	£139.24	£139.24
2677	Mar 12 2008 4	:58PM Ms	B	Williams	RWA Eque	strian Sports	£19.99	£19.99
2564	Feb 19 2008 2	:31PM Dr	Brian	James	Interface In	ternational Consultancy	£46.41	£46.41
								£298.46

How to create a supplier

The supplier module is very similar to the customer one.

- 1. Click on **Suppliers** on the left of your screen.
- 2. Click on the icon situated at the top of your screen: **New Supplier** this will bring up a smaller window where you can type in all the details.

w Supplier			
lew Supplier	Details :		
Description :			
Account Number :		Minimum Order Value :	
Contact Name :			
Address :			
County / State :		_	
Post Code / Zip :			
Country :	United Kingdom 🗸	1	
Phone Number :			
Fax Number :			
General E-Mail :			
Cancel		Finished	

How to edit supplier details

- 1. To edit supplier details open the supplier you want to edit.
- 2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save Changes to keep the amendments.

Sumber	Supplier Description	n: Hammer	
Supplier Details	Details Notes Cred	t Control	
g ^{er} Contact	Description :	Hammer	Account Number: F512
G Order History	Contact Name :	James Tilbrook	
Returns Products	DDI Number : Contact E-Mail :	01256 347489	1
	Order E-Mail :	jamest@hammerpic.com	<u> </u>
	URL :		<u>æ</u>
	Address :	Intec 1	
		Intec Business Park	
		Wade Road Basingstoke	
	County / State :	Hampshire	
	Post Code / Zip :	RG24 8NE	
	Phone Number :	United Kingdom	
	Fax Number :	01256 844123	
			đ
Close			Save Changes

Note:

You can also look here for order history with the supplier, returns and you can also view all product information from this supplier.

How to use the supplier search function

The search function is very useful when you are trying to locate an existing supplier.

- 1. Go into the supplier details screen.
- 2. Type in the **Search Text** box the information you have for the supplier e.g. "Var" for "Varlink".
- 3. Click on the **Search** button and the results will show the suppliers with "int" in the title.
- 4. Click on the supplier you want and the details screen will appear for that supplier.



How to place & receive purchase orders

When an order is placed by a customer the stock level for the product is automatically adjusted and an order is created with the default supplier, if there isn't any stock. An order would also be created if the minimum order level is breached by using the product in stock for the order.

- 1. To place a purchase order with a supplier, click on the **PO History** icon on the left of your screen. This will bring up the **Supplier Purchase** order screen.
- 2. Tick **Quotes** at the top of the screen. This will bring up all the purchase orders yet to be placed with a supplier.
- 3. Double clicking the correct supplier will bring up the order to be placed, and will show all of the order lines in detail.
- 4. Sometimes orders need to be placed with suppliers that are not related to a specific order or stock level. This can be done by adjusting the order quantities, or by adding a new item using the **Add Item to Order** button on the bottom of your screen. All the items not relating to a specific order will appear in the **Quantity Extra** column on the order.
- 5. Select all of the items you want to order from the supplier by ticking the box on the left, or press the **Select All** button at the bottom of your screen to order them all.
- 6. Before you place the order, choose which currency you would like the purchase order to be in, e.g. Sterling.
- 7. You can also preview your order before you send it to your supplier, just press the **Preview** button.
- 8. Place the order by pressing the **Place Order** button on the right of your screen.

Please Note: When you place the order Blue Logic will send your order by E-Mail, Fax and will allow you to print it.

Purchase Order : 67 - Status : Q	luote					
	Send Purchase O	rder :				Dexam/Henckels
Purchase Order Send Purchase Order Send Purchase Order Customer Wahing Template Wahing Work: Order Wahing Prevew PD Supplier Supplier Supplier	Code : // 12345/1 // US000A	Des Starter motor for titan NETWORK ADVISOR	cription :	Rard: 0 1	Extra: AExtra: U 19 1 0 0	ni Cost: Line Cost: 215500 E330000 25.95 E5.93
	Notes to Supplier :			1	Sub Total :	£3 309 99
		<	Add Item To Order		Delivery : Net Total : VAT : Order Total :	£0.00 £3,309.99 £579.25 £3,889.24
	Select All DeSelect Please select rows to place	All PO Currency : corder Exchange Rat	Sterling 💌	Estimated .	/Requested Delivery D	ate : 27/03/2008 💌
Close						Place Order

How to create a product

- 1. Click on the **Product** icon on the left of the main screen. From this screen you can search for any product.
- 2. To create a new product, click on the **New Product** icon on the top pf your screen. This brings up a **New Product** window, where you can type in all the relevant details you have regarding the product.
- 3. You can then select to open the product upon creation when you click Finished.

iew Flouid	et :
Product Code :	
Title	
Bacode	
Label / Make :	
Full Description	
Raleare Date	
Formal :	Retal Boxed . No. Serve Fortage
Formal :	Retail Board No. here: Portage No. News: Portage No. News: Deconferred
Fornal : Status : Suppler	Retail Board No. here: Postage C New Release * Nomail C Decontrand Code: Code: Code:
Fornal : Status : Suppler Pack Size :	Read Board No. here: Portage C New Release W Name O Decortinued T Code Code
Formal : Status : Supples : Options :	Retail Baset No. New: Postage: C New Rideare W Named C Decontinued B C Code: C B Stacked Hesc Details Sealed Names
Format : Status : Supplem Pack Size : Options : Group :	Flatal Board No. News. Postage C New Federat # Normal C Decembrand Image: Control of the Second Contr
Fornat : Stepler Suppler Pack Size : Options : George : Ceat Pice :	Field Book No. here: Portop C No. Release # Sincel C Descrimed B Color B R Stocket Social States Social States State Social States Social States States Social States Social States

How to edit product details

- 1. To edit product details open the product you want to edit.
- 2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save Changes to keep the amendments.

ten e	Item Description : SCANACEECAPALM : Aceeca Batch Palm	a
C Details	Details Options Suppliers Stoup Price Overrides Sile Supplier Overrides	
g' litter	Product Code SCANACEECAPAL Barcode	-
U Stock	Title : Aceeca Batch Palm Scanner with serial port (RS 232)	
Customer Orden:	Invoice Title : Category 1 : Category 2 :	•
Web Attributes R	Manufact, Ref: Label / Halon: Accesca	•
- Image	Model: DB Source :	-
🖓 Groups / Offers 🔅 🙀 Awards 斗 Calegoy	Full Description : Accessa Batch Palm Scanner with serial port (RS 232)	SCIN.
Cross Selling	Release Date: UDM : Each	-
Manufacturing *	Format Retail Boxed Volume Volume : Veget : 0	
Alocated To Work Dider	Status : O New Release 🔍 Normal O Discontinued	
Work Order Part	Cost Price: (2200.70	4
Oute	Bind and Chara Dadard Onter Courset New Microdiational Cours Course	

Note:

In the Product details screen you can search for order history, returns, product and stock information, including current stock levels, and where the stock is located.

You can have multiple suppliers for a product. Click on the **Suppliers** tab on the product details page and tick any of the companies who can supply the product. You can also change the default supplier of the product, use the drop down box and select a new default supplier. You can also use this information to populate your website with the very latest products.

How to use the product search function

The search function is very useful when you are trying to locate an existing product. With products you have two search options, either **Search** or **Advanced Search**.

<u>Search</u>

- 1. Go into the Products screen, click on the Search tab.
- 2. Choose if you want to search for the **Description Keyword** etc, by ticking the relevant boxes. Type in the information you have for the product e.g. "usb" for a usb cable.
- 3. Click on the **Search** button and the results will show products with "usb" in the title.
- 4. Click on the product and the details screen will appear for that product.

Products Bla	ae Logic													
Gerenal		1.1.0 No.	Poster Esportat	To Eacel Import Product	Select Products With Actions - Equal to Access									
Customer Details	Produ	icts : 5	Search			and .								
-9	Seath Advanced	(earch (bd-exced (search)												
-	4.e/	CCC Stant	Noduct Code (* Pro Nacode (* Den Nodel (* DB Test Lob	duct Code KEYWORD colption KEYWORD Source	© New Releases C Label / Make © Stock Level Greater Than C Manufacturer Rel □ Tackada Hidden	C On Pior C Suppler	e Lint n Product Code							
Culture Services	Seath		in long		1 Include Fillinger									
	100 1000	1011	Product Code	Description :	A REAL PROPERTY OF A REA	Net .	Gross Product Shehar	Fornal	Suppler Name					
Supplem	r	1000	EL01515L	1515L 15" Desktop LCI	9 with Accult ouch USB	1442.00	1519.35 Normal	Retail Ecold	Box Technologies Utd					
74.2	Г		CAROREAD21	21 in 1 Card Reader US		60.51	£10.00 Normal	Patal Sused	Target Components					
	F	2 2	NETUSIMINELS	3Con OfficeConnect	Wireless S4Mbps 11g Compact USII Networ	£17.01	E13.99 Normal	Retail Bo.	Computer 2000					
Contraction Contract	100		MODEMUSEADD	Addres Ulif Huden		111.50	122.11 Construction	COLUMN TWO IS NOT	School Section Street Street					
Contraction Contract			CASEOVER	Aniec Overture Quart Dr	nktop Case in Piero Black I	195.73	£100.74 Normal	Patal Bored	Microdirect Ltd					
\G	C 89	1	CASESUR38008	Antec SLK3000E LK/T	semale Advanced Ovacia (TAC (MidTover with 40	174.57	£97.15 Normal	Field Street	Computer 2000					
Burkey Dates	F 89	3	CASEAOP4508	AOpen H4508 Elack Ma	a Towne 300W ATK2 Silent PSU with SATA regiont +C	1.42.78	150.27 Normal	Retail Street	Computer 2000					
Purchase Unders	-	-	SFFAOPENE2915	ADpenNE Cube E2915	F Black.Antel (815G suck at LGA775 Pressont with Hea	\$220.70	1271.07 Normal	Field Booed	Congular 2000					
× .	r	1	P0040	Apple Pod Photo 6068	click-wheel Purlae + USB 2.0	8321.62	£377.20 Normal	Field Bured	Congular 2000					
		1	MEPOIDS.	Ana POICE Intel® 57	P Dual Steen 572 Mile FSB 26	23 28 002	ETGT 37 Concenterand	COLUMN TWO IS NOT	Microduset LM					
Providicium	C est	1	UP5350	Back-UPS CS 3504.U	58 or Secial Connectivity, Diata line Scape Protects	156.75	166.72 Normal	Fishal Ecosed	Computer 2000					
212	r		US88ELHU87	Bekin - USB/7port USB	2014.9	£0.00	E0.00 Normal	Retail Breed	Computer 2000					
10000000	-	1	HOUSELMINGLOW	Balkies Mers Optic al Giore	House Flatachable USB	\$37.01	£13.93 Normal	Retail Burned	Computer 2000					
Work Orders	F		PRICANPEGAA	Carlon - FOMA/P1800	EN A4 400x1200dx1058 2.0	00.03	Ell-00 Normal	Fistal Sused	Scorph Computers Ltd					
	-	1	PRICANCE 220	Canada - Saladas CH	THE WAR AND A CONTRACTOR OF A DATE	10.00	TO DO Mound	Red of Ro.	Computer 2000					

Advanced Search

- 1. Go into the products screen, click on the **Advanced Search** tab.
- 2. Choose if you want to search for a product e.g. from a certain supplier etc, by using the drop down menus. When you have clicked on the relevant drop down menu, choose which supplier you wish to search for, e.g. Varlink.
- 3. Click on the **Search** button and the results will show what products that particular supplier sells.
- 4. Click on the product you want and the details screen will appear for that product.

AR	Class Pate	nh List N	en Product Export List	To Excel Import Products Select	Papeluctz Web Actions Exp	of to Aceeca				
Customer Details	Prod	lucts :	Search							
-9	Search Advance	ed Search)								
Projects			NONE SELE	CTED		Label / Make:	NONE SELECTED			
	40	DB So	NONE SELE	CTED • Suppler	20780	Edlegory 1	NONE SELECTED			
Customer Services	Search	Award	NONE SELE	CTED Format	veta Mond	Calegory 2	NONE SELECTED			
30	100 100		Product Code	Description	VIP	Not	Gross Product Status	Fornat:	Supplier Name	Label
Succhers	Г				Vodatone Business Vodatone Ltd	£0.00	E0.00 Normal	Retail Boxed	Varink Ltd	
1000	F		POSPRTZEB2824	Zetra LP28245 2" DT desktop piet	er Water Cooler sue	£257.96	E303.10 Normal	Fletal Boxed	Varlink Ltd	Zebra
		2	POSPRIZEB2044NET	Zebra 2044 4" Wide Label Printer ve	th USB. Senal & 10/100 Interface	8,460.00	£543.50 Normal	Fletal Boxed	Varlink Ltd	Zebra
Customer Dickers	F	3	SCANACEECA	Aceeca Batch Palm Scanner with Tr	racer Plus	\$349.00	£410.00 Normal	Retail Boxed	Varlink Ltd	
	F	4	SCANACEECADESK.	Desktop Dade with USB connector		£36.32	E42.68 Normal	Retail Boxed	Valek Ltd	Aceeca
100		3	SCANACEECAHAND	Handstap		£10.53	ET2.37 Normal	Fletal Boxed	Verlink Ltd	Aceeca
schaue Orders	F	3	SCANACEECAHOL	Aceeca Padded Holster		£10.00	E11.75 Normal	Fletal Boxed	Varlink Ltd	Aceeca
	n	1	SCANACEECAPALM	Aceeca Batch Palm Scanner with se	mial port (RS 232)	£241.58	E283.86 Normal	Retail Boxed	Valinik Lhd	Aceeca
16	F	2.	SCANACEECAVEH	Aceeca Vehicle Charger		\$13.16	E15.46 Normal	Retail Boxed	Valek Etd	Aceeca
PatientLists	F		SCANOPTISMART	Opticon H19A Smatphone Handheil	d Scanner	£843.00	£997.50 Normal	Retai Boxed	Varlink Ltd	
			SCANTT8200	TT-Netcon 8200 Handheld Shorbar	nge Scannver	£0.00	E0:00 Normal	Retail Boxed	Valiek Ltd	
			SCANTTBROOPG	TT-Netcon TT8800 Longrange Sca	nmer with Platol Grap	\$1,596.00	£1,981.05 Normal	Retai Buned	Valinii, Lhž	100
Work Orders		1	STLAB102K152x1	102x152 Labels for Zebra Label Print	Rer (Drve Box)	£161.64	£105.93 Normal	Retail Boxed	Varlerk Ltd	Zebra
-			STLAB102(152x2.4	102x152 Labels for Zebra Label Print	ter (2-4 Bowes)	£131,52	E154.54 Normal	Retail Boxed	Valiek Ltd	Zebra
6	C	8	51LAB102K152+8+	102x152 Labels for Zebra Label Print	ter (Eight + Buves)	£117.24	£137.76 Normal	Retail Bowed	Valiek Lhd	Zebra
vit Locations			STLA857k324	Zebra Z-Select 2000D Renovable -	57 x 32mm Perf 2100 p/r (-Box of 12)	\$20.32	E82.63 Normal	Retail Boxed	Varlink Ltd	Zebra

How to do manufacturing

- 1. Go into the Products screen and click **New Product**.
- 2. Type in the details for the new product.
- 3. Make sure you tick the **Manufactured Box** and the **Open Product on Completion** tick box.
- 4. Click Finish, a warning window will appear, advising once a manufactured item is created, it cannot be changed to a normal item. Click Yes.

Manufac	ctured Item
2	Please note - once a manufactured item is created, it CANNOT be changed to a normal Item
	Yes No

- 5. The product will open, click on the **Options** tab, you can choose either **Batch Manufacturing** or **Serial Numbers**.
 - Batch Manufacturing is an option if you wish to make multiple quantities of the same product, e.g. 10.
 - Serial Numbers is an option if you have one item to make and you wish to allocate a Serial Number to that one item.

Item - 12111 : A manufactured	part - Details
Rem 🔊	Item Description : 12111 : A manufactured part
C Details C Parts List C Stock C Order History C Marufacturing History E Senial Nos C Awards C A	Details Options Notes Group Price Overrides Price Table Group :
A Analus Cross Sel Attachments Attachments	Warrenty Warrenty Period 0 Service Required Service Previd (Days): 0 Service Product : Extract Polytics to Order and Hide Adde Double Polytics Decemption
	Sach Hard Labourg Sach Hard Labourg On Till Quick Sale Buttons Allow Repeat Billing (For Monthly / Yearly Direct Debits) Billing Product : Select Hide Product From Searches On Price List
	Vat Rote : Standard rated transactions (17.5%)
Close	Print Label Clone Product Build Now Save Changes

- 6. Click on **Parts List** and click **Add Parts**. At this stage you can also add non-stocked products, such as Labour, electricity charges etc. (You need to add these as new products; they will then appear in the Parts List).
- 7. At the bottom of the Parts List screen, there are 2 columns showing the Cost Price to you and the Estimated Sell Price, you can over-ride this by clicking on **Details** and inputting a set cost or sell price.

😥 Iten 🔹	Item Descriptio	n: 1211	1 : A man	ufacture	ed part	
Details Parts List Stock Order History Order History	Product Code : 11 123456	Description : 1 Product 1	Unit Cost : £22.87 £10.00	Unit Sell : £30.00 £15.00	Only Required: 1 1	Wastage X : 0% 0%
Awards (* Awards Coses Sell Attochments (*						
Attachments	Cost:			Estimated	Sel :	
	Parts Total : Suppliers Deliv Sub Total :	Hy:	632,47	VAT : Total :		C45.44
	Total:		63.15	Margin : Available	to Build :	26,35%

8. Click **Build Now** enter the quantity of how many products you want to build. This will create a work order.

General		3						
A2	Close Refre	esh List						
Customer Details	🕄 Woi	k Or	ders : Se	earch				
Projects	 Waiting For P Waiting For P 	arts (Temp arts	olate) C Re	eady To Build eady To Build	C Assemi C Assemi	bly Completed C	Ready To Ship	
	Order Number :	Title :	Forename :	Company Name :	Surname :	Template Description :	Status :	
Customer Services								
Suppliers								

- 9. There are several stages, when you get to the **Work Orders** screen, depending at what stage the manufactured item is at.
 - Waiting for Parts, an item will appear in this section if some of the parts are not in stock.
 - **Ready to Build**, an item will appear in this section if all the parts are in stock and the item is ready to be built.
 - Assembly Completed, the item is built.
 - **Ready to Ship**, the item is ready to be shipped to the customer.

Build BOM We	rk Order					
Build Work	Order :				Work 0	rder Id 29
Customer	Name : NONE - F	OR STOCK				
Qnly Ordered :	Qnly To Be Picked:	Qnty Found:	Stock Location :	Product Code :	Product Description :	
1 3	3	0	Top Drawer Top Drawer	11 123456	1 Product 1	
Final L	ocation : N	one		👪 CA	ange Location	
Assem Inspect Packed Serial I	bled By : ted By : d By : No :				Auto Generate	
Close				RePrint Kitle	ng List	Completed

How to re-stock your van

- 1. Double-click the **Re-stock van** icon on the warehouse computer, this brings up a page for you to use.
- 2. Choose the employees name from the drop down menu at the top of the screen.
- 3. Select your vehicle (or vehicle you want to re-stock)
- 4. Scan in the items you wish to restock by scanning the barcode with the scanning tool. This changes the stock location of the product to the van.

Please Note:

You cannot enter stock here that has not previously been in warehouse stock.

🍓 Restock ¥AN		×
Move Stock :		
Employee :		•
Target Location :	10	
Description		
Brackens Van		
Johns Van		
Martins Van		
Paul Hope Van		
Paul Peka van		
Richards Van		
Barcode :		
⊙ Add	C Minus	
Items To ReStock		
•1		•
C	OMPLETED	

How to print a job sheet

- 1. Click on the diary icon on the left hand side of the main screen.
- 2. Select a period e.g. day, week or month to view.
- 3. Click **Print Job Sheet**; this will print all the job sheets for all the employees for that period.
- 4. Give the job sheets to the employees to do the specified jobs.



- 5. If only a single job sheet is required, right click on the relevant appointment on the diary page and select **Print Job Sheet**.
- 6. Once printed the date and time of last printing is shown, also an icon on each appointment changes to indicate that sheet has been printed.

Manson	Open Customer Open Order Convert to Callout	۰,	Fun
	Print	Þ	Print Job Sheet
	Confirm Delivery		Print Appointment Sheet
	Allocate Attendees	×	Print Summary for Period
	Move Event	×	Print ALL Job Sheets for Period
	Send E-Mail		Print ALL Appointments for Period
	Set Reminder	L	1

How to enter completed job sheets & delivered orders

When you receive completed job sheets from an employee, with bar code labels stuck on the back, to scan into the computer.

- 1. At the main menu, go into the **Picking Lists** icon on the left of the screen.
- 2. Tick the title **Ship Account Order** which is situated at the top of the screen, this brings up a list of all the jobs waiting to be completed.
- 3. Choose the order number you have the job sheet for, double click and go into **Despatch**.
- 4. Using your scanning tool scan all the barcodes attached to the job sheet. You can also type product codes in and if not found you can also search for the product using the search wizard, keywords etc.
- 5. When you have finished, click **Complete and Pay** at the bottom of the screen, this then brings you to the next window called **Ship Order**.
- 6. The **Ship Order** screen allows you to see the order lines and total order value. Also at the bottom left hand side you can see the job sheet attendance dates for the order. If the dates/times are different to that scheduled on the diary you can click on **add time**. This takes you into the diary to add additional work time to the order.

	Ship Order	
	Payment Authorisation :	Order Id: 1630
	Customer Name : Quavity Didead : Qnly Despatched : Line Statu : Und Sel Price : Line Total : Product Description : Quavity Didead : Qnly Despatched : Line Statu :: Und Sel Price : Line Total : TESTIFRIDUCT Testification : 1 Avoiding Despatched : £10.00	
	Invoice Address : Shipping / Delivery Address : Special Instructions / Work Canied Out :	
	1 La Way La Way	4
	KS P R.S United Kingdom United Kingdom	
	Attendance Dates / Times :	Free OI Charge Delivery E0.00 Accept Estimated Delivery
	Total Value of This Order :	£11.75
	Opening Balance : Despatch Note Value :	E0.00 Use Balance
	Set Delivery Date : Adjustment Value :	0 Discount 💌
	Delivery Currently Set For : New Balance :	0
Attendance Dates	Tuesday, 19 February 2000 Set Delivery Cheque / Cash Value :	0
& Add Time	Coor Window	Ship Goods

- 7. To complete the process you must then click on either **Free of charge delivery** or enter an amount to charge. (This is extra to work time and is added to the total order value).
- 8. When you have set the delivery charge, the icon on the bottom right allows you to **Ship Goods** to complete the order.
- 9. Upon shipping a small window will appear, which gives you the option of creating an invoice at that time, which allocates one order to an invoice. If you click no then you will the opportunity to create invoices from multiple orders back in the main menu from the **Invoicing** icon.

How to use CTI/TAPI functions

Tapi/CTI allows integration into your existing office telecoms systems. This allows you to view statuses of other extensions, **Screen Popping** of client and supplier details and direct calling with a single mouse click.

With TAPI, when the phone rings the phone number automatically appears on the desktop and the customer's details appears on your screen, to allow for instant recognition of the customer status and for any details to be changed, updated etc.

TAPI is proven to be invaluable, especially for the mail-order and customer service environment.

