

# Sales Desk

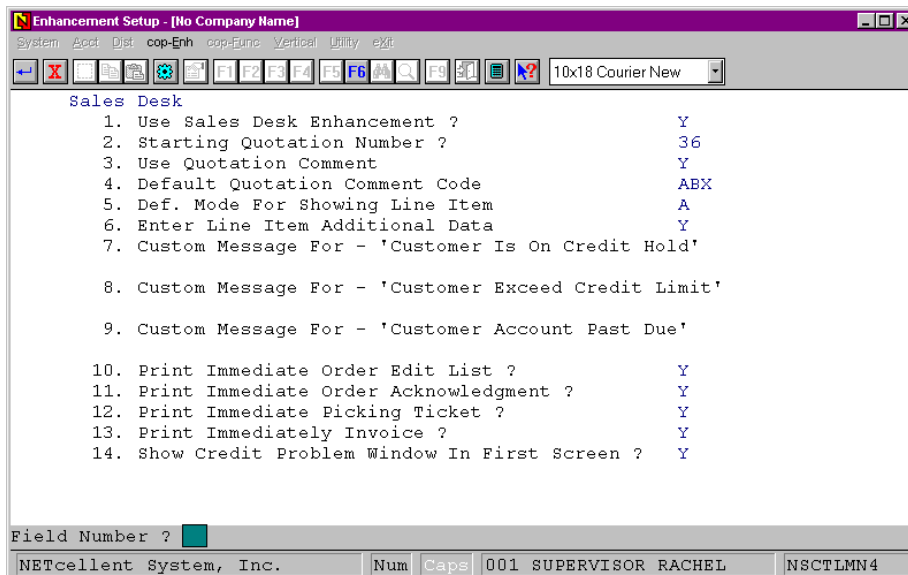
## Purpose of Function

Sales Desk is designed for companies who need to use a more advanced order entry module. It is used when customers call to inquire about stock and pricing before they make a purchase. It is also useful for distributors and manufactures that ship merchandize from multiple locations. It provides functions that allow you to check invoice history, customer accounts, and credit information. You can also predefine what information you want to be entered when you add a new customer or change an existing customer's information. The Sales Desk screen can be customized to display customer and item information.

## Enabling Sales Desk

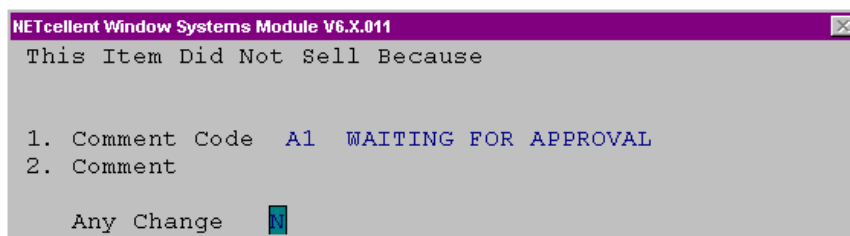
Before using the Sales Desk Function, you must enable this enhancement under Enhancement Setup.

1. Select **Util\_setup** from the Main Menu.
2. Select **enHancement** setup.
3. Select **cop\_Enh**.
4. Select **sales Desk**.



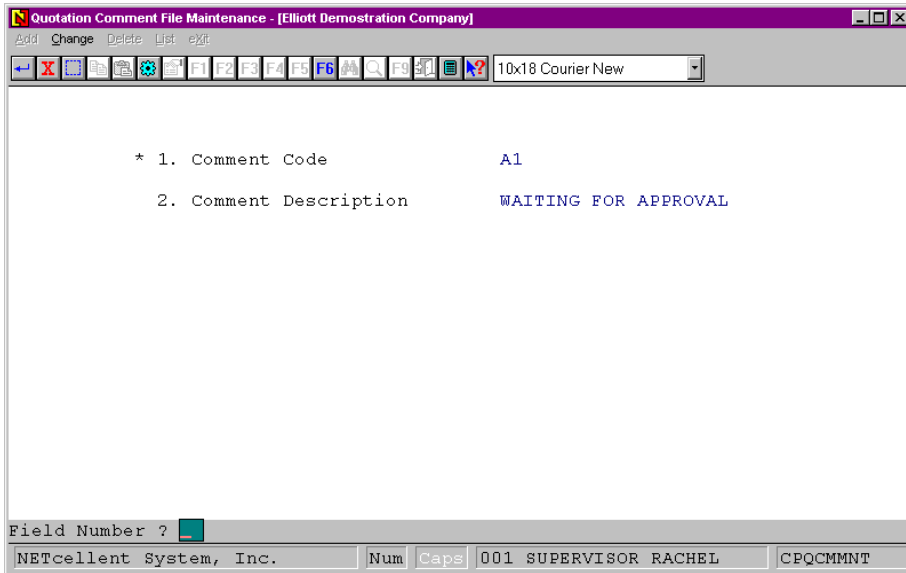
**Figure 4M.1.** shows the setup screen for Sales Desk.

1. Use Sales Desk Enhancement?  
This flag must be set to “Y” to turn on the Sales Desk enhancement. If you do not wish to use the Sales Desk feature, set this flag to “N”.
2. Starting Quotation Number?  
This flag determines what your starting quotation number will be. Items that are flagged as “Q” are assigned a quote number. In Figure 4M.1, the starting quote number is 36.
3. Use Quotation Comment  
This flag will only affect items that you leave as “Q” for quotes. If this flag is set to “Y” you will get an additional window, similar to Figure 4M.2, when you are entering orders or quotes from the Sales Desk screen. This screen allows you to store a reason why you were not able to sell an item to the customer.



**Figure 4M.2.** *shows your default quotation comment code.*

4. Default Quotation Comment Code  
If you want to store the reason why you were not able to sell an item you can setup a default reason code that will automatically display when you see this window during Sales Desk order entry. Figure 4M.2 shows the display window you would get after flagging your line item status as “Q” for quote. The default is set to “A1” (Figure 4M.2) which contains the comment “waiting for approval”. The comment codes are setup by selecting:
  1. **D**istribution
  2. **C**ustomer Order Processing
  3. **M**aintenance
  4. **Q**otation comment file



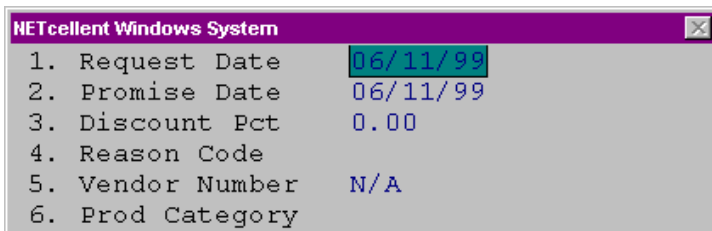
**Figure 4M.3.** shows the comment code maintenance screen.

### 5. Def. Mode For Showing Line Item

When using Sales Desk you have the option of showing “A” for all types of orders (which includes C confirmed orders and Q for quotes) or “C” confirmed orders only. If you flag this to “A”, then you will be able to see all line items on your Sales Desk Screen. If you set it to “C”, then only confirmed line items will display.

### 6. Enter Line Item Additional Data

If you answer “Y” to this flag, you will get an additional window after you enter the line item from the Sales Desk. This window will prompt you for such information as shown in Figure 4M.4.



**Figure 4M.4.** shows the additional data to enter for a line item.

### 7. Custom Message For - 'Customer Is On Credit Hold'

This field allows you to enter a user-defined message that will appear whenever a customer is on credit hold. If it is left blank the default message will be “Customer Is On Credit Hold”.

8. Custom Message For - 'Customer Exceed Credit Limit'  
This field allows you to enter a user-defined message that will appear whenever a customer exceeds their credit limit. If it is left blank the default message will be "Customer Exceed Credit Limit".
9. Custom Message For - 'Customer Account Past Due'  
This field allows you to enter a user-defined message that will appear whenever a customer's account is past due. If it is left blank the default message will be "Customer Account Past Due".
10. Print Immediate Order Edit List?  
If you answer "Y" to this flag you will be asked "Do You Want To Print Edit List Immediately?" after generating a sales order from Sales Desk. This flag will only affect you if you confirm a line item and then create a sales order from Sales Desk.
11. Print Immediate Order Acknowledgment?  
If you answer "Y" to this flag you will be asked "Do You Want To Print Acknowledge Immediately?" after generating a sales order from Sales Desk. This flag will only affect you if you confirm a line item "C" and then create a sales order from the Sales Desk.
12. Print Immediate Picking Ticket?  
If you answer "Y" to this flag you will be asked "Do You Want To Print Immediate Picking Ticket?" after generating a sales order from Sales Desk. This flag will only affect you if you confirm a line item and then create a sales order from the Sales Desk.
14. Print Immediately Invoice?  
If you answer "Y" to this flag you will be asked "Do You Want To Print Immediate Invoice?" after generating a sales order from Sales Desk. This flag will only affect you if you confirm a line item, create a sales order from the Sales Desk and change number 1. Order Type to an I (Invoice) type order.
15. Show Credit Problem Window In First Screen?  
If you answer "Y" to this flag, you will get an additional window after you enter the customer from the Sales Desk. The displayed window is similar to Figure 4M.5.

# 1

## Sales Desk

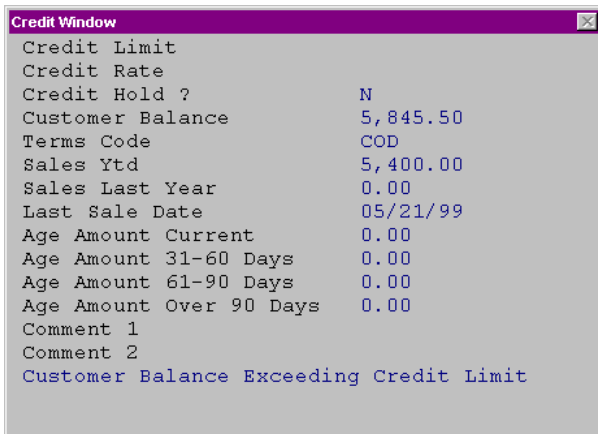


Figure 4M.5. shows the customer credit information.

There is also an additional under enhancement setup which relates to Sales Desk. To access this flag select:

1. Util\_setup from the Main Menu.
2. enHancement setup.
3. cop\_Func.
4. order Line item screen.

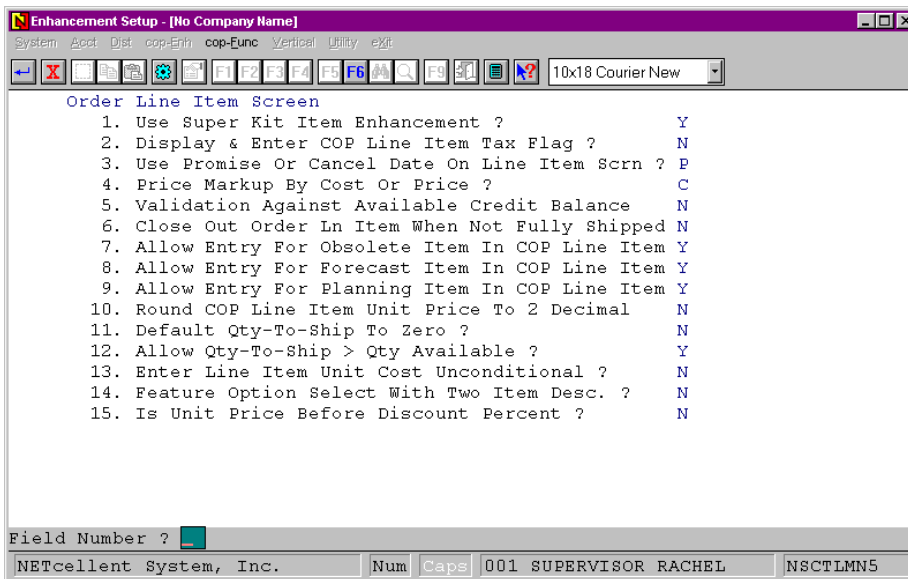


Figure 4M.6. shows the enhancement setup for line items. Number 15 effects your line item price in sales desk.

15. Is Unit Price Before Discount Percent?

If you answer “Y” to this flag, your price in Sales Desk will not show the customer’s discounted price. If you answer “N”, the customer’s discount amount will be applied and your price will show the discounted price.

**Setup of Sales Desk Screen Layout**

The Sales Desk Screen Layout can be accessed by selecting:

1. Util\_setup from the Main Menu.
2. enHancement setup.
3. cop\_Enh.
4. sales desk screen Layout.

The Sales Desk Screen Layout is a user definable area which allows the user to select the fields that will be shown on the Sales Desk Screen. (Figure 4M.7)

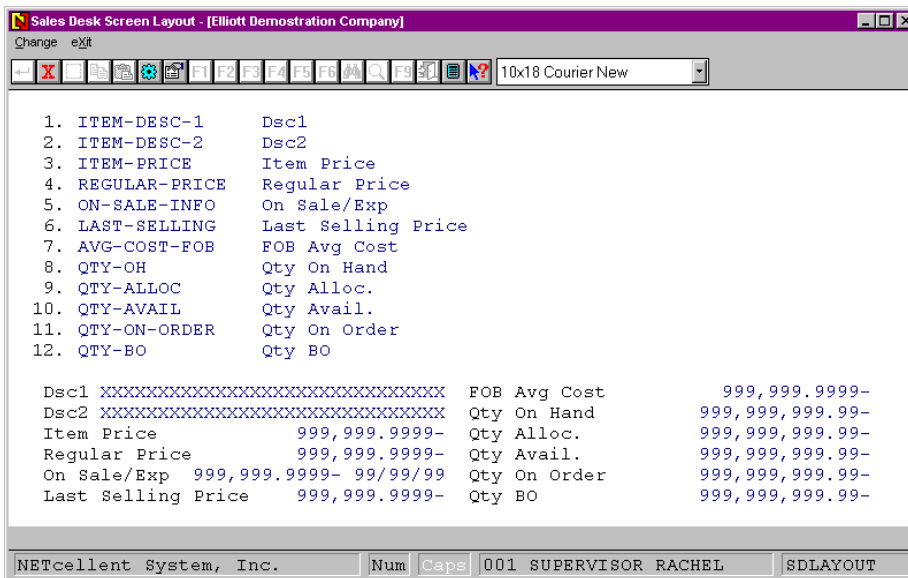


Figure 4M.7. shows the selected fields that will display on the sales desk screen.

This enhancement function allows you to select up to twelve fields to display on the Sales Desk screen. To see a list of fields that can be displayed select a field number, such as 1, and press F7. The user can display both customer and item information. The fields that we selected in Figure 4M.7 are displayed in the middle of the Sales Desk screen as shown in Figure 4M.8.

# 1

## Sales Desk

The screenshot shows the 'Sales Desk - Elliott Demonstration Company' window. The interface includes a menu bar (Maintenance, Inquiry, Processing, Reports, Util-setup, exit), a toolbar with icons, and a font dropdown set to '10x18 Courier New'. The main display area is divided into several sections:

- Customer Information:**
  - Caller: Elliott
  - Customer No: 700000
  - Elliott CA 91700
  - Slm MGR Manager
  - Customer Disc 0.00
  - Type: DISTR DISTRIBUTOR
  - 3/15 N/30
  - Limit 1,000,000
- Item Pricing and Inventory:**
  - Dsc1 Elliott NWSM
  - Dsc2
  - Item Price: 995.0000
  - Regular Price: 995.0000
  - Last Selling Price: 995.0000
  - FOB Avg Cost: 0.0000
  - Qty On Hand: 98.00
  - Qty Alloc.: 9.00
  - Qty Avail.: 89.00
  - Qty On Order: 0.00
  - Qty BO: 0.00
- Item List Table:**

Item No	Item Description	WH	Qty	Your Price	ST
1 10012	Elliott NWSM	LA	1.00	995.0000	<input checked="" type="checkbox"/>
2					
3					
4					
5					
6					
- Quote Summary:**
  - Quote No: 85
  - SUPERVISOR
  - Stk/Sel UOM: EA EA
  - 995.0000
  - TTL: 995.0000
- Footer:**
  - Q=Quote, C=Confirm F5=Options
  - Num Caps 001 SUPERVISOR RACHEL CPSSLDSK

**Figure 4M.8.** shows the fields we selected from sales desk screen layout. These fields display in the middle section of the sales desk screen.

## Change the Customer Screen Layout

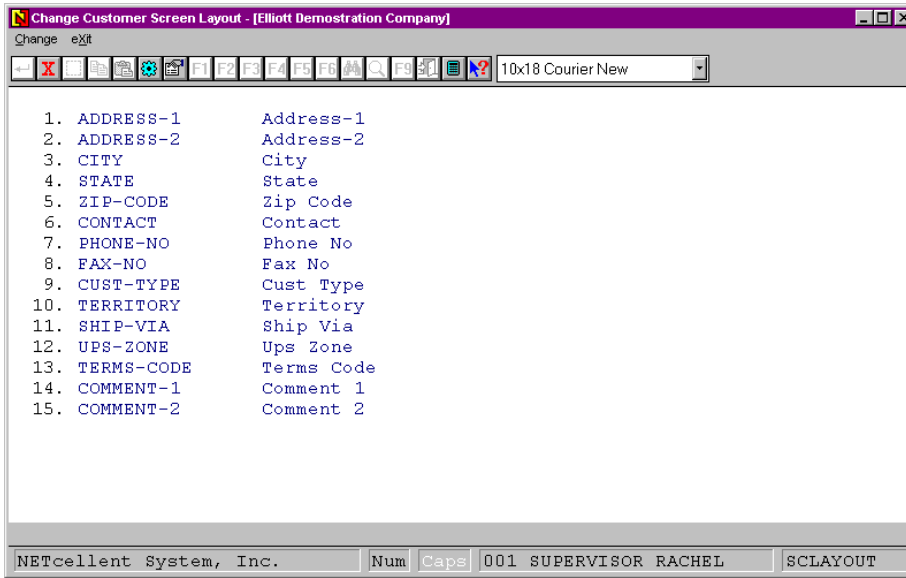
To access the Customer Screen Layout select

1. Util\_setup from the Main Menu.
2. enHancement setup.
3. cop\_Enh.
4. cHg cust screen layout.

The Customer Screen Layout allows the user to select the fields that will be shown when the user adds a new customer or changes an existing customers' information from Sales Desk. To add a new customer, choose F5 options then choose Add Customer Data. To change a customer's information, choose F5 options then choose Change Customer Data. (Figure 4M.9)

# 1

## Sales Desk



**Figure 4M.9.** *shows the selected fields to display when adding or changing customer information.*



## Using the Sales Desk Function

To use the Sales Desk Function select

1. Distribution
2. Customer Order Processing
3. Processing
4. Sales Desk

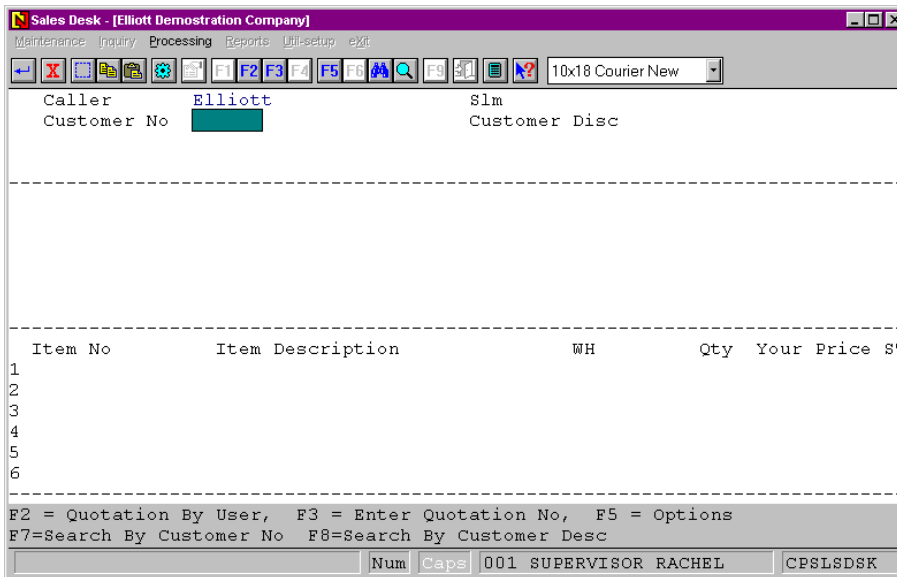


Figure 4M.10. shows the sales desk screen.

1. **Caller:** You can enter the caller’s name or leave it blank. You can also choose F5 options. Pressing F5 will display a window similar to figure 4M.11. It will allow you to view your newly received items, if the customer wants to know what has been recently received, add a new customer, if this is a new customer and they are not in the database, and print an order edit list or print an invoice edit list. If you add a new customer you will be prompted to enter the fields you selected when you defined Change Customer Screen Layout. The screen for adding a new customer is shown in Figure 4M.12.

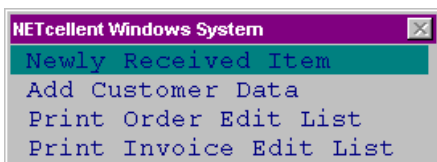


Figure 4M.11. shows your F5 options.

# 1

## Sales Desk

NETcellent Window Systems Module V6.X.011

Customer:

1. Address-1
2. Address-2
3. City
4. State
5. Zip Code
6. Contact
7. Phone No
8. Fax No
9. Cust Type
10. Territory
11. Ship Via 1 Pick-Up
12. Ups Zone
13. Terms Code C COD
14. Comment 1
15. Comment 2

**Figure 4M.12.** shows the fields you can enter when you add a customer. These are the same fields we setup in figure 4M.9.

2. **Customer No:** You can search for the customer using the standard F7 and F8 functions including any additional search keys you have defined. F2 allows you to search for quotes that you have previously entered from Sales Desk. If you know what the quote number is you can enter it using F3. For F5 options refer to number 1 (Figure 4M.11) above.

Sales Quotation Search By User

Date	Time	Quote No	Customer Name	Line	Status
06/11/99	16:48:04	10	ORACLE	001	Quote
06/11/99	16:45:50	9	ORACLE	001	Quote
06/11/99	16:19:18	4	ORACLE	001	Quote
06/11/99	16:18:28	6	ORACLE	001	Quote
06/11/99	16:14:10	5	ORACLE	001	Quote
06/11/99	15:27:48	3	ORACLE	002	Quote

Dn, Up, PgDn, PgUp, RETURN To Select

**Figure 4M.13.** shows your previously entered quotes.

# 1

## Sales Desk

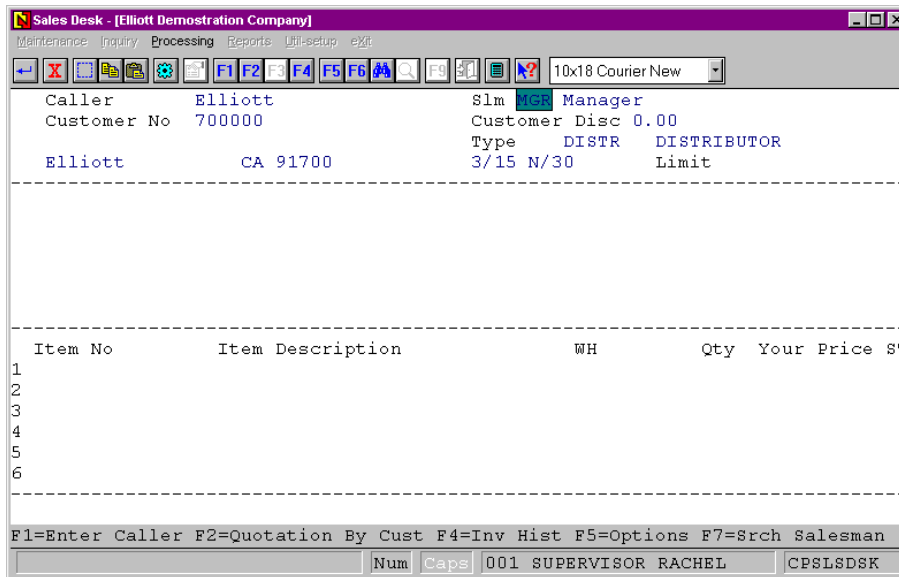


Figure 4M.14. shows the field from which you can change the salesmen.

- Salesman:** From the salesman field you can choose F1 to change the caller. F2 allows you to search for quotes that you have previously entered from Sales Desk. F4 allows you to view the invoice history for the customer you have selected based on a specific item or all items. F5 options gives you a number of choices as shown in Figure 4M.15. Once you select an item F5 gives you more options as shown in Figure 4M.20. You still have the options to view newly received items, print an order edit list and an invoice edit list. You can also view or change customer information and view the customers credit information. Customer account inquiry allows you to view account information, as shown in Figure 4M.16, for the current customer or you can specify a different customer. Customer account summary allows you to view account information which has been purged, as shown in Figure 4M.17, for the current customer or you can specify a different customer. Choosing F7 will allow you to display the salesmen you have previously defined in your salesmen record and you can choose a salesmen from the list to change to a different salesman.

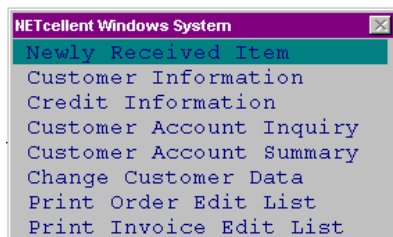


Figure 4M.15. shows yours options for F5 from the salesmen field.

# 1

## Sales Desk

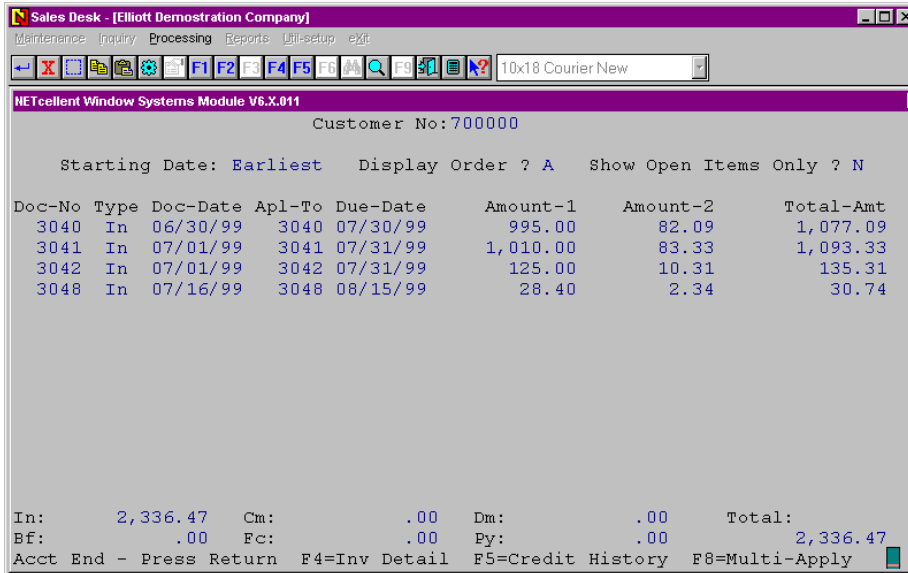


Figure 4M.16. shows customer account inquiry information.

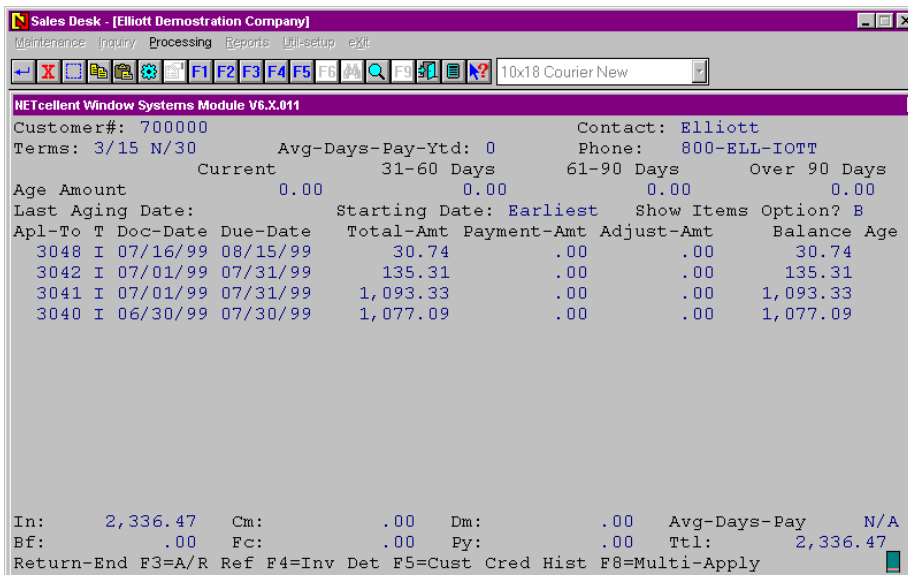


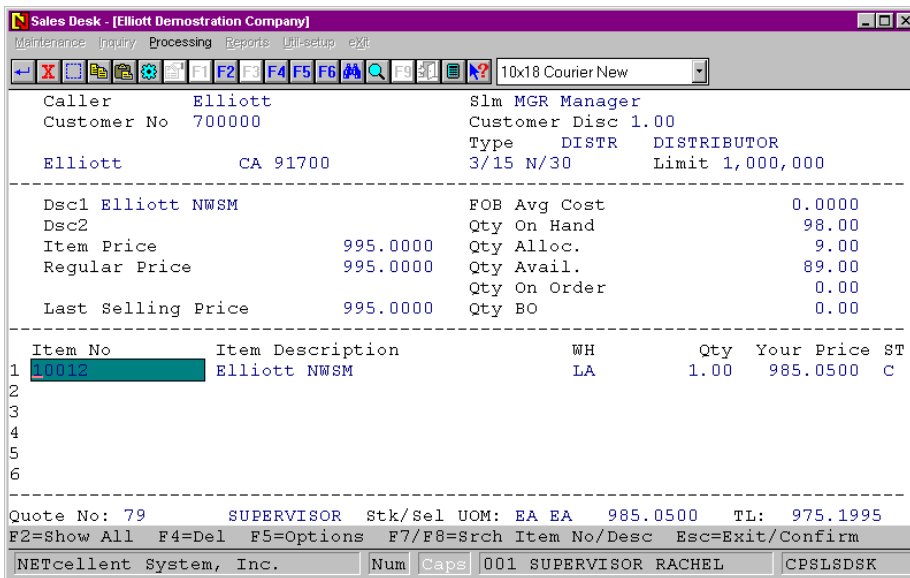
Figure 4M.17. shows customer account summary information.

4. **Customer Disc:** This field allows you to specify a discount percentage for this customer. The discount will only apply to this order. To see the discounted price for line items flag 15, in the enhancement setup for line items, must be set to "N". Choosing F5 gives you the same options as number 3 above as shown if Figure 4M.15.

# 1

## Sales Desk

5. **Item no:** This is the field where you enter or inquire about the line items. If you choose F2, only the line items that you have confirmed will be displayed as shown in Figure 4M.18. Pressing F2 again will change it back to show both “C” confirmed and “Q” quoted items as shown in Figure 4M.19. If you enter an incorrect item or want to delete an item you can press F4 to delete the selected item. Choosing F5 Options, before entering any line items, gives you the same options as choosing F5 from the salesman (slm) field. F7 and F8 allow you to search for items by number or description. Pressing Esc allows you to exit from the current order and will save any line items you have entered.



**Figure 4M.18.** shows only Confirmed items. Notice that item number 10014 is not displayed, as it is in Figure 4M.19, because its status is “Q” for Quote.

# 1

## Sales Desk

**Sales Desk - [Elliott Demonstration Company]**

Maintenance Inquiry Processing Reports Util-setup exit

10x18 Courier New

Caller Elliott SIm MGR Manager  
 Customer No 700000 Customer Disc 1.00  
 Elliott CA 91700 Type DISTR DISTRIBUTOR  
 3/15 N/30 Limit 1,000,000

---

Dsc1 Elliott NWSM FOB Avg Cost 0.0000  
 Dsc2 Qty On Hand 98.00  
 Item Price 995.0000 Qty Alloc. 9.00  
 Regular Price 995.0000 Qty Avail. 89.00  
 Last Selling Price 995.0000 Qty On Order 0.00  
 Qty BO 0.00

---

Item No	Item Description	WH	Qty	Your Price	ST
1 10012	Elliott NWSM	LA	1.00	985.0500	C
2 10014	POS CashTrax	LA	1.00	500.0000	Q
3					
4					
5					
6					

---

Quote No: 79 SUPERVISOR Stk/Sel UOM: EA EA 985.0500 TL: 975.1995  
 F2=Show Confirm Only F4=Del F5=Opt F7/F8=Srch Itm No/Desc Esc=Exit/Confirm

NETcellent System, Inc. Num Caps 001 SUPERVISOR RACHEL CPSLSDSK

**Figure 4M.19.** shows both Confirmed and Quote items.

- WH (warehouse):** From this field you can select F3 to choose a substitute item. F5 options gives you the same options as above and also allows you to view details regarding available to promise information as shown if Figure 4M.20. Available to promise provides details about who has placed orders for the selected item, the quantities they ordered, the order date and which warehouse it will be shipped from. Component availability displays quantity on hand, available and on order information for each component of a featured or manufactured item. You can display this information for the current item or select a different item. Price break displays the information as shown in figure 4M.21. Item invoice history shows history information for the current item, as shown if Figure 4M.22. Customer invoice history shows history information for the current customer, as shown if Figure 4M.23. F7 Multi- Location allows you to select a different warehouse location to ship the item from. Different line items can be shipped from different warehouse locations.

# 1

## Sales Desk

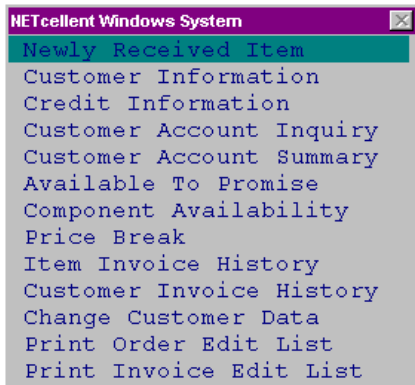


Figure 4M.20 shows your F5 options after choosing a line item.

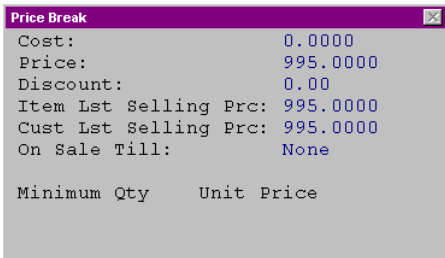


Figure 4M.21. shows price break information for the current item.

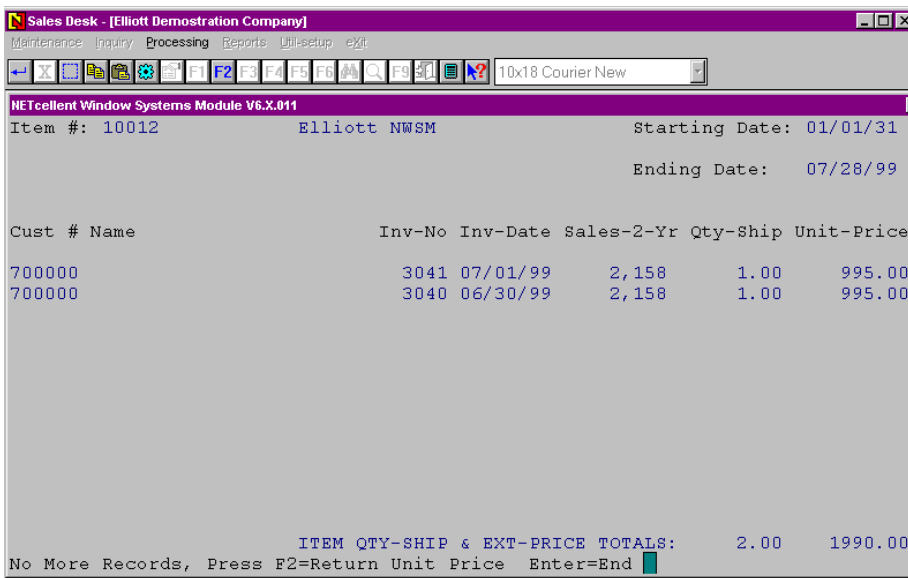


Figure 4M.22. shows the item invoice history information for the current item.

Item-No	Description	Inv-No	Inv-Date	Qty-Ship	Unit-Price
10012	Elliott NWSM	3041	07/01/99	1.00	\$995.00
10012	Elliott NWSM	3040	06/30/99	1.00	\$995.00
10002	ETRADE SHARES	3042	07/01/99	1.00	\$40.00
10000	IBM Stock	3042	07/01/99	1.00	\$85.00

**Figure 4M.23.** *shows the customer invoice history information for the current customer.*

7. **Qty (quantity):** F2 change item description allows you to change the description for the current item only, the changed description will not effect the item master record and will not be displayed the next time you view the item. F5 options gives you the same options as number 6 above.
8. **Your Price:** You can change the price for this item, the new price will not effect the item master record and will not be the price next time you view the item. F5 options gives you the same options as number 6 above.
9. **St (status):** The default is “Q” for quote. If the customer decides they want to purchase this item you would change it to “C” for confirmed. If you confirm an item you will be prompted to create a sales order. If you choose not to create an order “N” the line item status will change back to “Q” for quote. If you choose “Y” a screen equivalent to the order entry screen will be displayed for you to enter additional order information. If you confirm items from two or more warehouse locations, it will create two ore more separate orders, one for each warehouse location. F5 options gives you the same options as number 6 above.

Once you have completed entering a line item there is additional information displayed as shown in figure 4M.24.



# 1

## Sales Desk

Sales Desk - [Elliott Demonstration Company]

Maintenance Inquiry Processing Reports Exit

10x18 Courier New

Caller Elliott Slm MGR Manager  
 Customer No 700000 Customer Disc 0.00  
 Elliott CA 91700 Type DISTR DISTRIBUTOR  
 3/15 N/30 Limit 1,000,000

---

Desc1 Elliott NWSM FOB Avg Cost 0.0000  
 Desc2 Qty On Hand 98.00  
 Item Price 995.0000 Qty Alloc. 6.00  
 Regular Price 995.0000 Qty Avail. 92.00  
 Last Selling Price 995.0000 Qty On Order 0.00  
 Qty BO 0.00

---

Item No	Item Description	WH	Qty	Your Price	ST
1 10012	Elliott NWSM	LA	1.00	900.0000	Q
2 10012	NETCELLENT Elliott NWSM	NY	1.00	995.0000	Q
3 10012	Elliott NWSM	LA	1.00	995.0000	Q
4					
5					
6					

---

Quote No: 69 SUPERVISOR stk/sel UOM: EA EA 995.0000 TTL: 0.0000  
 Field Number ?

NETcellent System, Inc. Num Caps 001 SUPERVISOR RACHEL CPSLSDSK

**Figure 4M.24.** shows the quote number, the unit of measure for the item and the total of the confirmed items at the bottom of the screen. Notice that changing the item description, location or price does not effect the default information for the same item.