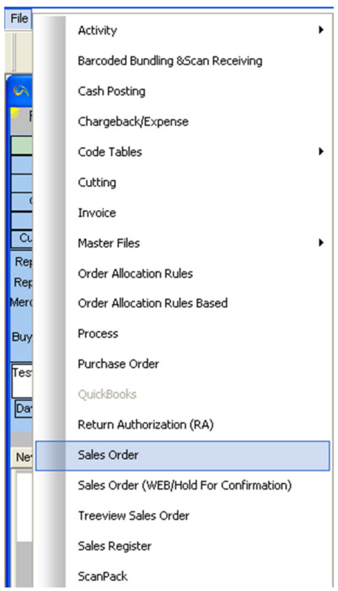
Sales Order

This command allows you to see or input your **customers' sales orders**. For example, you can input your **customers' information and styles ordered**. In the **sales order** form, you can bring up a **list of styles** and select several at a time to **reduce** the redundant data entry. And once the order is ready to be shipped, the **sales order** information can be transferred to the **invoice** to save your time.

- To Enter a **NewSalesOrder**:
- Click **File** on the **Menu** bar
- Choose **Sales Order**



-OR

- Click on the **Sales Order** button on the **tool bar**
- It can also be found on the tool bar

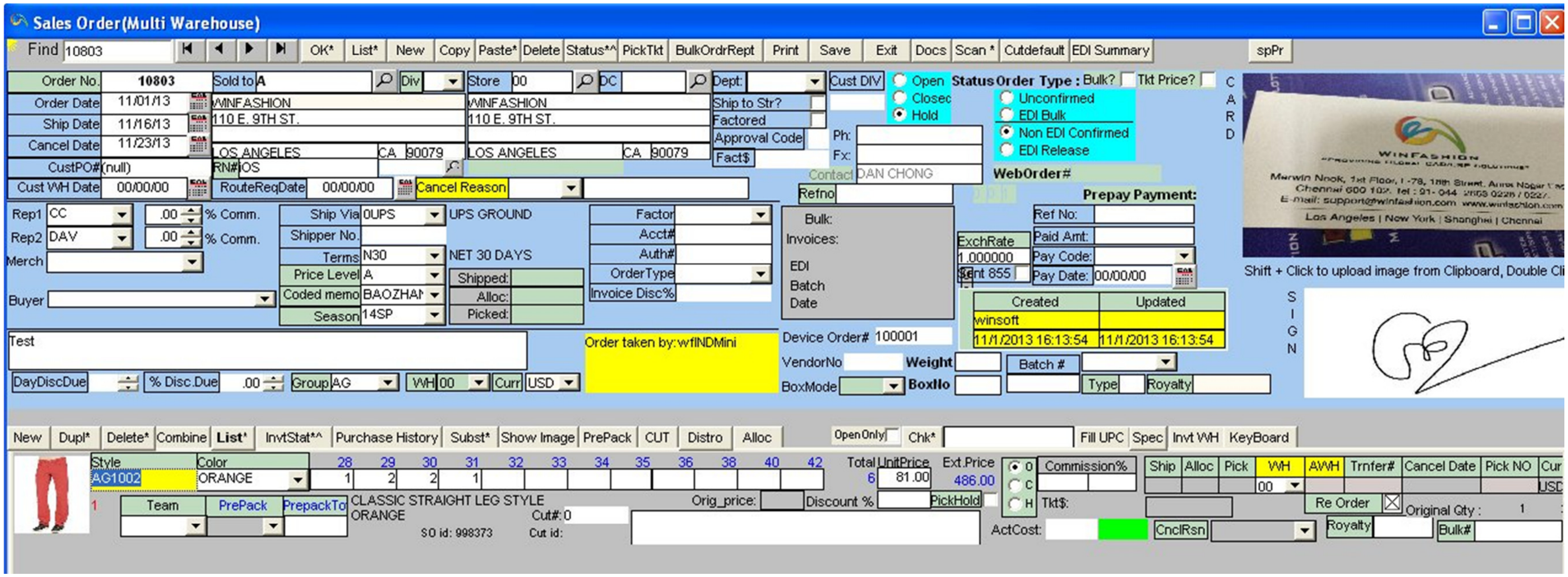
- Click on the **New** button to create a **new Sales Order**

- Choose one of the following date types to generate the report:
- Enter the **Order date** or click on the button to the right of the box to open a calendar.
- Enter the **Ship date** or click on the button to the right of the box to open a calendar.
- Enter the **Cancel date** or click on the button to the right of the box to open a calendar.
- Select the **"Sold to"** customer by clicking on the button to the right of the box
- Choose a **customer** from the **list**
- Click on the **Select** button to return to the **sales order screen**
- The **customer** information will appear in the screen. If the **Sold to** address is different from the **"Ship To"** address, click onthe **"Store"** button to the right to bring up thevarious shipping addresses for that customer.
- Enter any other necessary information in the top portion of the screen
- Now you are ready to enter the styles ordered. Click on the **"New"** button in the row of buttons in the middle of the screen (Not the New button at the top of the screen). A blank horizontal line should appear.
- Click on the **List** button in the row of buttons in the middle of the screen (anotherwindow should appear) to bring up a list of styles.
- Highlight all of the styles that are needed by clicking on the first style with the mouse then hold the **<Ctrl>** key and left-click the mouse to select more styles.
- Click on the **Select** button
- Back in the **Sales Order** screen**,** enter the quantity of each size in the corresponding boxes according to style and color.
- After entering all necessary information, select the **Save** button

<u>To Retrieve a Previously Entered Sales Order:</u>

- Click on the **List** button to choose from a list of existing **Sales** Order.
- What if the Sales Order I'm looking for is not appearing in the list?
- The **current** view is defaulted to **"Open Sales Order"**. You may change the list view to **Open", "Closed", or "All" Sales Orders**.Go to the top of the Sales Order list. There is a box with the headings **"All", "Open", and "Closed"**. Click on the desired circleto change the view.
- The **Sales** Order may not be in the system or deleted from the system
- The **Sales Order** has not yet been saved in the system. This usually happens when multiple users enter **Sales Orders** and an order is currently being entered in the system but the user did not save it yet. Therefore, it does not show up in **WinFashion**until it is saved.
- Click on the **Get Data** button then highlight the **customer** that you want to choose

- Highlight the desired **Sales** Order
- Click on the **Select** button
- Make any necessary changes then click on the **Save** button



Sales Order List Button 

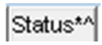
- This button displays a **list** (eg. invoices, purchases and sales orders) on screen.
- **NOTE: In certain lists, you may need to click on the "Get Data" button to retrieve the data. In these types of situations, the list view will be blank at first. After you click on the "Get Data" button the list will appear given there is data in Winfashion.**
- Double-click on the **row** to select. Double-clicking is an alternative to typing the code and then clicking **GO**. A list will be displayed and from this list, the record may be selected.

New Button to create a new entry- 

- Click on the new button to create a new entry.

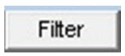
Delete Button 

- The **Delete** button is used to delete a **row/record** from the list, table, or line (click **Delete**).
- If you click **Delete**, the program will confirm deletion (click **Yes** to do so and **No**, otherwise).

Status of Sales Order 

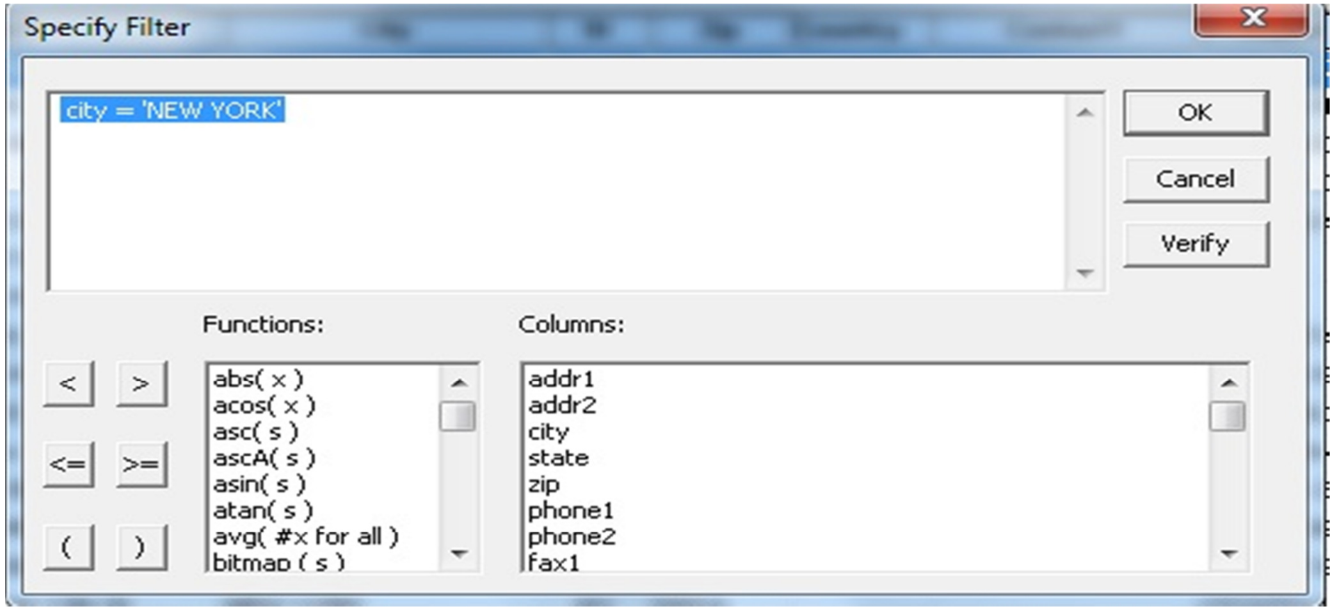
The **Status report** shows you **order, shipped and balance** information. A variation of the status report also shows you the **allocated amounts.** This report can be seen in the sales order or invoice as a **status button.**

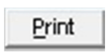
- Go to **Sales Order**
- Go to the **List button** to retrieve an existing **Sales Order**
- Highlight the **order** number
- Click on the **Select button**
- Click on the **Status Button** to see the status report

Filter Button 

The main function of the **filter button** is to separate certain information from the rest within a specific topic. It is especially useful in the reports when you want to see specific information and not the rest of the report. For example, for the zip code table, you might only wish to see all cities for the state of New York. Another example of the filter button is in a report, you will see information from one date range to another based on sales order, customer, factor, and style information. But you just want to see all of the sales orders that are factored. Therefore, you can filter the sales order with factors only.

- Click **Filter** if you want to see rows of the list that meets a certain condition.
- The filter window prompts you to input a **filter condition**. The columns **Functions** (verb) and **Columns** (noun) appear.
- **TIP: Filter condition** strings are **case-sensitive** which means that upper case strings are different as compared to their lower case counterparts. For example, you want to filter one customer out of the whole list. In the customer listing, the City code is "NEW YORK" for New York. Therefore you would enter [city='NEW YORK'] also to filter. If you enter [city='new york'] (notice it is lower-case) the filter will not work.
- After typing **filter condition**, click **OK** to **Filter**, **Cancel** to exit or **Verify** to check the validity of the filter condition.



Print Button 

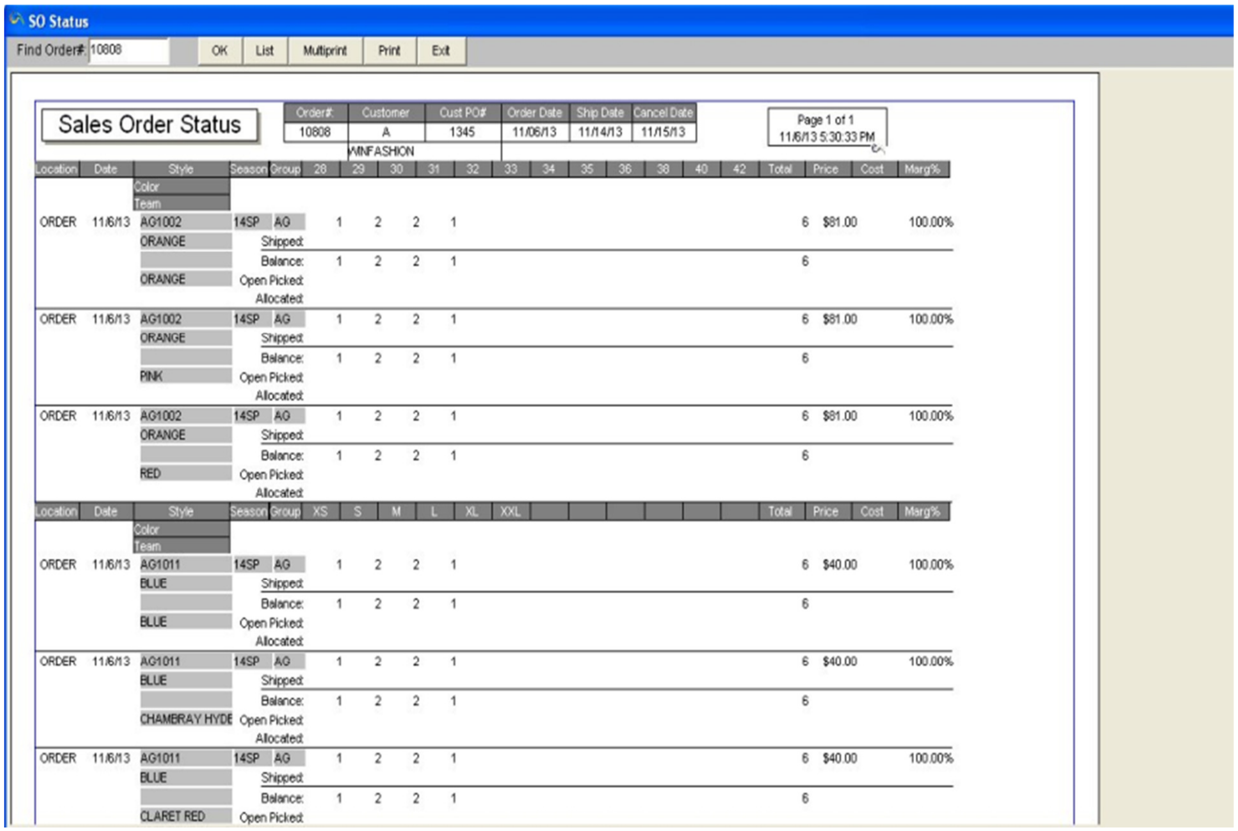
· The **Print** button is used to print information on the current window (click Print). There may be several options such as printing multiple pages, portrait/landscape mode, and print preview. If it does not begin printing, make sure you have a printer attached or networked to your computer (if it is networked, check the power of the computer that has the printer attached to it. Make sure the computer and printer's power is ON. If you have more than one printer networked, make sure you are printing to the correct printer), the printer driver is installed correctly in your computer, check the printer to see if the power is on, check the printer to see if it is offline or if there are any errors. For more information, refer to the owner's manual that came with the printer.

To see the allocated amounts in the status report:

- Go to **Sales Order**
- Retrieve the desired sales order
- Right-click with the mouse on the **Status button**
- The **allocated amounts** will appear along with the order, shipped and balance.
- If you want to print this report, click on the **Print button**

If you want to print several sales order status reports at one time, click on the Multiprint button

- Click on the **Get Data button**
- Highlight all of the **Sales Orders** that you want to create a report for by hold the **<Ctrl> key** and left-clicking on the mouse
- Click on the **Select button** to begin printing



Sales Order Pick Ticket Button-

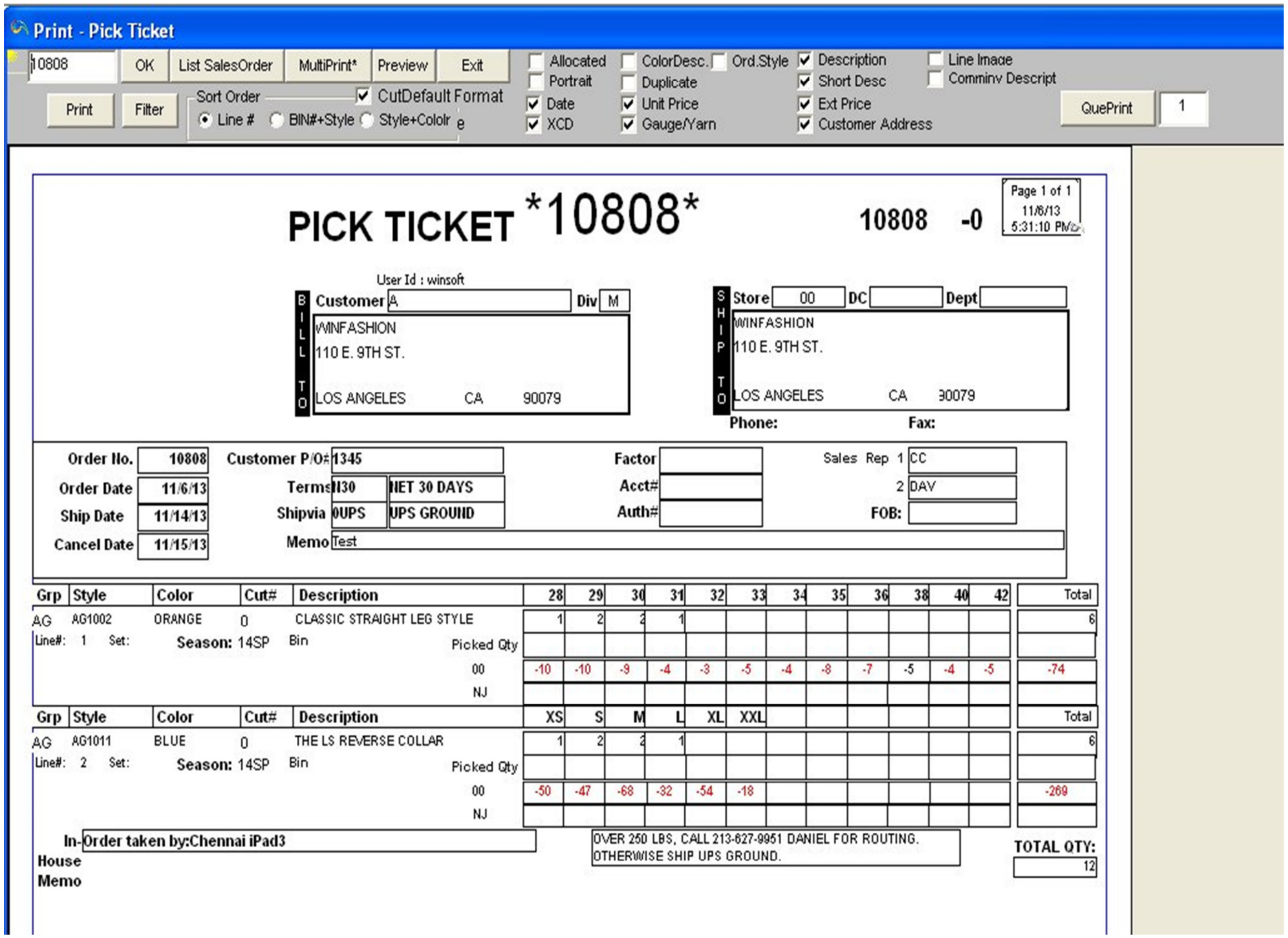
The Pick Ticket allows you to "physically pick" or put aside finished goods from inventory. It helps you facilitate your inventory to shipment. Also, the Pick Ticket will show items that have not been shipped yet.

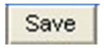
- If you are not in the Sales Order window, click on the Sales Order icon.
- After entering the Sales Order information, click on the Pick Ticket button to see related information.
- To print the Pick Ticket, click on the Print button

-OR-

To print more than one Pick Ticket, click on the MultiPrint button

- **Highlight** all of the Pick Tickets (Sales Orders) that you want to print then click on the **Select button**



Save Button 

- The **save** button is used to save the **record** to the table/list. (Click **Save**)

Duplicate Button 

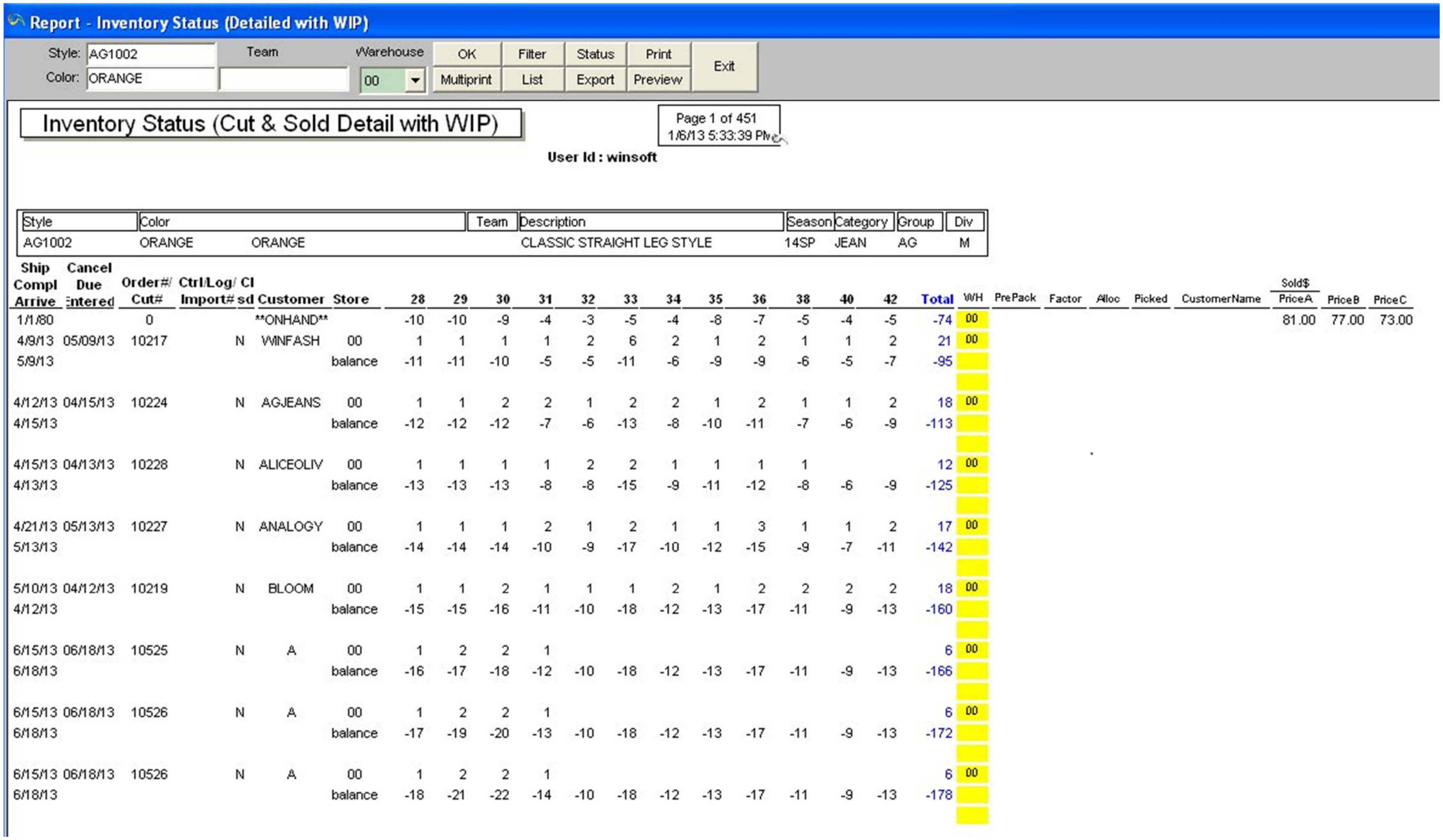
The **Duplicate button** is used to copy the current record or line to a new record or line (click **Duplicate**).

Important Tip: For some tables (ex. **code table**), Winfashion will give an error message if you do not change the main code (primary key) for this duplicated record/row after clicking the Save button. For example, if you duplicate the color BLUE in the **colors code table** and click **Save**, an error message will appear (BLUE should not be in the list twice - click **OK**, type another code or **Delete** the duplicated record).

InvStat Button 

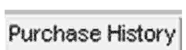
- Right-click on the **inventory Status button** to retrieve a quick **summary** of the finished goods inventory.

- The **On Hand, WIP, On Order, and Available quantity** is also available. If you want a **detailed inventory report** left –click on the **Inventory Status button**. Another window will appear with the report. The report includes <u>cut ticket information</u> and <u>sales order information</u> including quantity.

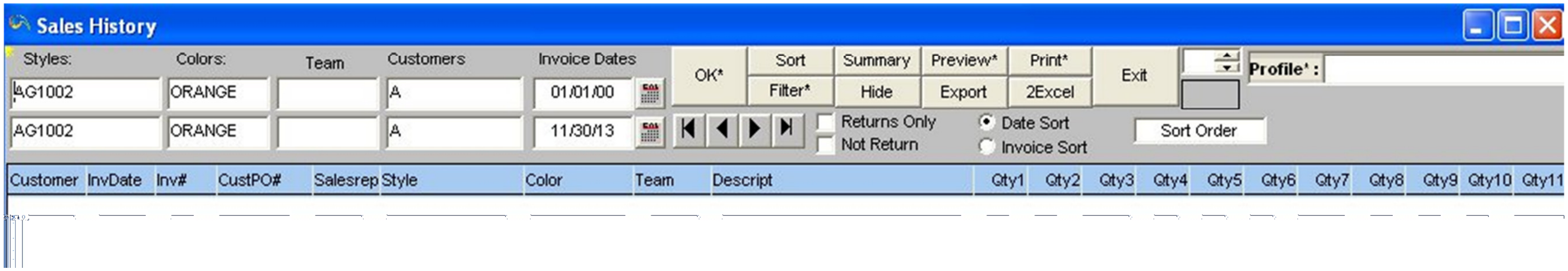


Style	Color		Team	Description	Season	Category	Group	Div
AG1002	ORANGE	ORANGE		CLASSIC STRAIGHT LEG STYLE	14SP	JEAN	AG	M

Ship Compl Arrive	Cancel Due Entered	Order#/ Cut#	Ctrl/Log/ Import#	Cl sd	Customer	Store	28	29	30	31	32	33	34	35	36	38	40	42	Total	WH	PrePack	Factor	Alloc	Picked	CustomerName	Sold$ PriceA	PriceB	PriceC
1/1/80		0			**ONHAND**		-10	-10	-9	-4	-3	-5	-4	-8	-7	-5	-4	-5	-74	00						81.00	77.00	73.00
4/9/13	05/09/13	10217		N	WINFASH	00	1	1	1	1	2	6	2	1	2	1	1	2	21	00								
5/9/13						balance	-11	-11	-10	-5	-5	-11	-6	-9	-9	-6	-5	-7	-95									
4/12/13	04/15/13	10224		N	AGJEANS	00	1	1	2	2	1	2	2	1	2	1	1	2	18	00								
4/15/13						balance	-12	-12	-12	-7	-6	-13	-8	-10	-11	-7	-6	-9	-113									
4/15/13	04/13/13	10228		N	ALICEOLIV	00	1	1	1	1	2	2	1	1	1	1			12	00								
4/13/13						balance	-13	-13	-13	-8	-8	-15	-9	-11	-12	-8	-6	-9	-125									
4/21/13	05/13/13	10227		N	ANALOGY	00	1	1	1	2	1	2	1	1	3	1	1	2	17	00								
5/13/13						balance	-14	-14	-14	-10	-9	-17	-10	-12	-15	-9	-7	-11	-142									
5/10/13	04/12/13	10219		N	BLOOM	00	1	1	2	1	1	1	2	1	2	2	2	2	18	00								
4/12/13						balance	-15	-15	-16	-11	-10	-18	-12	-13	-17	-11	-9	-13	-160									
6/15/13	06/18/13	10525		N	A	00	1	2	2	1									6	00								
6/18/13						balance	-16	-17	-18	-12	-10	-18	-12	-13	-17	-11	-9	-13	-166									
6/15/13	06/18/13	10526		N	A	00	1	2	2	1									6	00								
6/18/13						balance	-17	-19	-20	-13	-10	-18	-12	-13	-17	-11	-9	-13	-172									
6/15/13	06/18/13	10526		N	A	00	1	2	2	1									6	00								
6/18/13						balance	-18	-21	-22	-14	-10	-18	-12	-13	-17	-11	-9	-13	-178									

Purchase History 

- This button allows you to view a **purchase history** of a cutomer.The **purchase history** will contain the customer name, styles purchased in the past, total sizes and average amount of purchase.



Show Image Button- 

This button allows you to show drawings or a scanned image of a style/raw material's "image one"(It is the top image either in Sales Order or Raw Material).

<u>**To see Image 2 or Image 1 in the Sales Order:**</u>

- Click on the **Sales Order button** on the tool bar
- Go to the **List button**
- Click on the **Get Data button**
- Highlight the desires **Sales Order**
- Go to the **Show Image button**
- Right Click with the mouse on the **Show Image button** to show the **Image 2** from the Style Master
- Left Click with the mouse on the **Show Image button** to show the **Image 1** from the Style Master
- If you would like to hide the image, click on the **"Hide Image"** button that is also known as the **"Show Image"** button.

Prepack Button 

- This button allows you to **prepack styles** based on quantity in the **Sales Order** for shipping. For example, for style **1001** the size break is XS, S, M, and L. The prepack would be 1,2,2,1 for the corresponding sizes of that style. **Prepack** is usually used for finishes goods/styles.
- First enter the necessary **Sales Order** information such as customer billing and shipping address.
- Then enter the **style** and **color** information
- Enter the **prepack ratio** in the size break fields/boxes.

- In the box labeled **"Pack:"** enter the total quantity ordered for the style and color.
- Click on the **"Prepack" button** to enter the prepack amounts in each size.
- Enter all other information then click on the **Save button.**

Sales Order Allocation 

This feature allows you to allocate available styles and colors within a sales order. By creating this within the sales order, you can create a pick ticket that shows the allocated amounts only. This pick ticket can help facilitate an accurate invoice later on.

- Create a **new sales order** or bring up an existing sales order
- Highlight the **style and color** by clicking on the line
- Click on the **Alloc button** within the **sales order**
- Another window will appear with the order information as well as spaces to enter **allocated** amount. Enter the amounts that you want to allocate.
- Click on the **Save button** in this screen to save the changes
- To go back to the sales order, click on the **Exit button**
- Click on the **Save button** in the sales order window
- Click on the **Pick Ticket button**

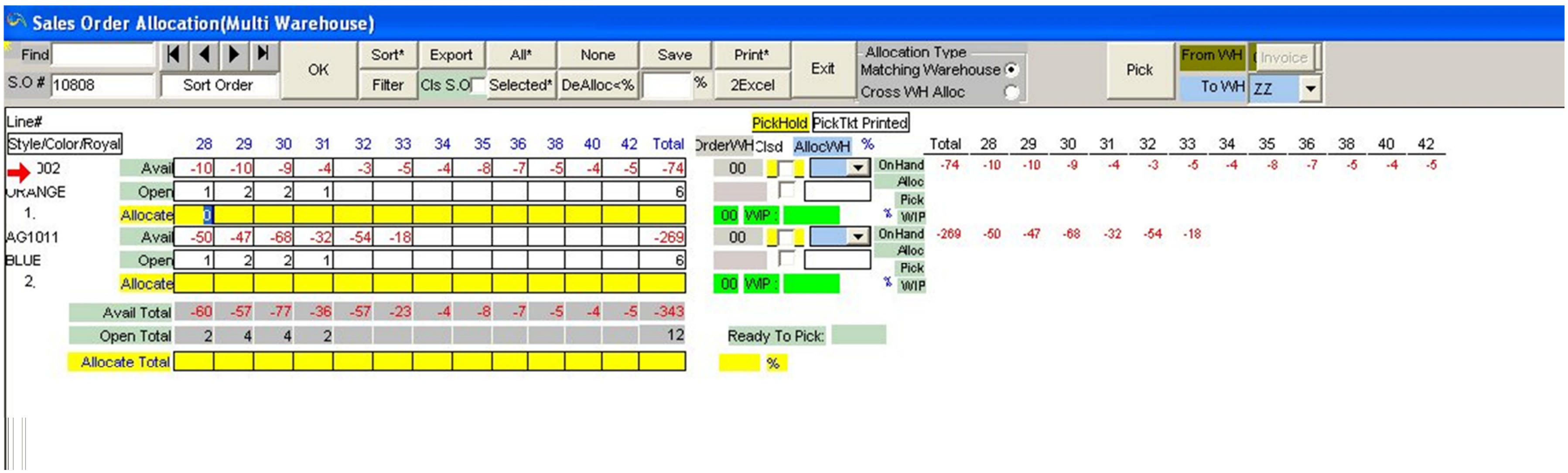
<u>To view an Allocated Pick Ticket:</u>

- Click on the **PickTkt button** in the **Sales Order** screen
- Check the box next to the word **"Allocated"**
- Click on the **OK button**
- A **new pick ticket** should appear with only the **allocated** amounts
- To print this **pick ticket**, click on the **Print button**
- To go back to the **sales order**, click on the **Exit button**
- The next step is to physically **"pick"** the styles from the warehouse
- Once you have **picked** the styles from inventory, you are ready to create an invoice

- Create the **invoice** based on the quantity on the pick ticket by entering the amounts in the corresponding style, color, and size break/category. If the amounts differ from the sales order quantity, then the remaining quantity will be a part of the **backorder or unshipped amount**. You will later be able to create another **invoice** with the remaining amounts.

<u>What if nothing shows up in the Pick Ticket Screen?</u>

- It may mean the Sales Order was shipped/invoiced.
- Or it may mean the Sales Order was not saved yet. You can save the order by going back to the Sales Order screen then click on the **Save button**.



Enter the quantity that you want to allocate in the corresponding boxes. On the far right of the window, you will see the **on hand (inventory)**, **allocated** and **wip (Work In Progress/Cut Ticket)** for reference.

<u>Open Only</u> 

-This check box within the Sales Order is useful if you ship an order in several different invoices. If the box is checked, then you will see only the styles and colors that remain on backorder/unshipped. If the box is unchecked, all styles and colors will appear from the sales order whether shipped or unshipped.

Find a SKU Number-

Enter a SKU number here to find a style and color. Enter the SKU number then click on the “Enter” key on the keyboard. If the SKU number is not in the system, a window will appear with the message “Cannot find SKU-CODE”.