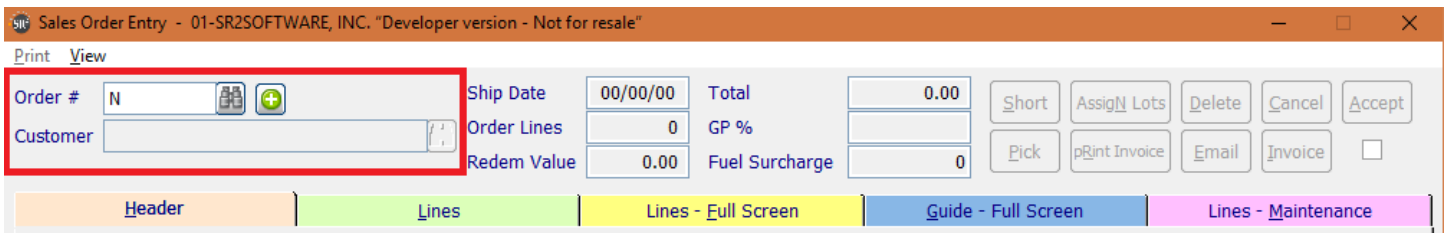
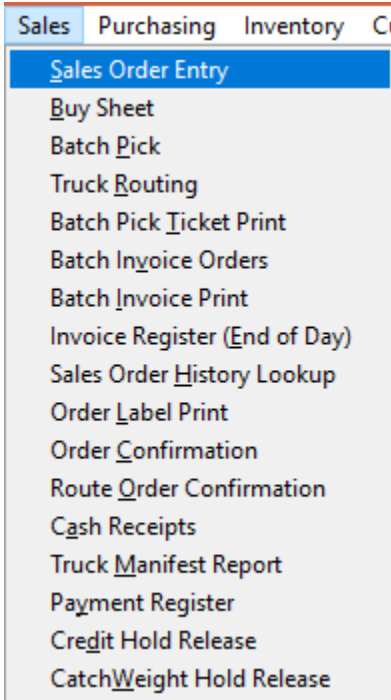



# Sales Orders


Sales order entry is used to create or update orders placed by your customers. If you will be using this option I would recommend that you place this on your shortcut bar.

To open sales order entry screen you click on the Sales menu and choose Sales Order Entry.



**Order #:** Click the  or type in N for New Order #.

You can also search for open Sales Orders if you click on the .

**Customer:** Enter in the customer name or a portion of their name to use the Rapid Intelligent Search or click the  to search for a customer.

## Rapid Intelligent Search

Rapid intelligent search allows you to type in a partial name and the system will return all results that match. In this example, we are searching for AJ's Restaurant. When we type in **rest** and press Return, the system lists all the customers that contain the name rest in the Cust ID, Company Name, or Contact Name. Simply double click to choose the customer from the Customer Keyword Select screen.

Sales Order Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Print View

Order # 6041 ENTERED Ship Date 00/00/00 Total 0.00

Customer mel Order Lines 0 GP %

Redem Value 0.00 Fuel Surcharge 0

Buttons: Short, Assign Lots, Delete, Cancel, Accept, Pick, Print Invoice, Email, Invoice

Customer Keyword Select - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Cust ID	Name	City	State	Contact	Phone
DIS	discount customer	Cranston	RI	Melissa	401-946-7010
M1030	MELS LUNCH	NEWPORT	RI	GREG	401-849-6420
M7200	Melissa's Hot Rod Cafe	Cranston	RI	Melissa	401-946-7010
M7201	Melissa's Hot Rod Cafe II	Cranston	RI		
MBMEL	Master Bill Melissa Hot Rod	Riverside	RI		
S6212	SR2SOFTWARE LLC	CRANSTON	RI	Melissa	401-946-7010
S9900	SR2 Food	Cranton	RI	Melissa	401-946-7010

When you select the customer, a message may appear if the customer is over their credit limit. You will be able to view the unpaid invoices and the total open balance.

Customer Credit Limit - 01-SR2SOFTWARE, INC. - M7201 Melissa's Hot Rod Caf...

Customer Has Exceeded Their Credit Limit of \$1000

Invoice ID	Invoice Date	Due Date	Amount
5575	01/09/14	01/30/14	1,281.47
5699	04/25/14	05/09/14	175.00
5729	07/02/14	07/16/14	645.64
5763	09/05/14	09/19/14	10,533.00-
5764	09/05/14	09/19/14	10,533.00-
5785	09/16/14	09/30/14	210.66-
5873	04/15/15	04/29/15	252.69

Do You Wish to Proceed - Y/N? No

If you want to enter in the new order, you can **type the letter Y** or **select the drop down and choose Yes**. If you do not want to enter in the new order, you can **type the letter N** or **select the drop down and choose No**.

If the customer has a credit status of Hold you will get a message telling you that the order will be placed on hold until it is released. If the credit status is Suspend then you will not be allowed to enter a new sales order for the customer.

## Header Tab

This is general information regarding a customer's order.

The screenshot shows the 'Sales Order Entry' window for '01-SR2SOFTWARE, INC. "Developer version - Not for resale"'. The 'Header' tab is selected and highlighted in red. The interface includes a top navigation bar with 'Print' and 'View' options. Below this, the order status is 'ENTERED'. Key fields include Order # (6041), Ship Date (12/19/16), Total (0.00), Customer (Melissa's Hot Rod Cafe II), Order Lines (0), GP %, Redem Value (0.00), and Fuel Surcharge (0). A row of buttons includes Short, Assign Lots, Delete, Cancel, Accept, Pick, Print Invoice, Email, and Invoice. A secondary navigation bar contains tabs for Header, Lines, Lines - Full Screen, Guide - Full Screen, and Lines - Maintenance. The main content area is divided into sections for 'Sold To' and 'Ship To' information, and a 'Notes' section. The 'Sold To' section includes Name, Address 2, Address 3, City, State & Zip, and Phone & Fax. The 'Ship To' section includes Address 1, Address 2, Address 3, and City, State & Zip. The right side of the form contains fields for Ship Date, Route, Stop #, Terms, Customer PO#, Sales Rep, Price Level ID, Ship Via, Fuel Zone ID, and Warehouse ID. A 'Warehouse Ship' button is located next to the Ship Via field.

**Ship Date:** This date is located at the top center next to the Order #. The field is view only it is controlled by Company Maintenance, Parameter Tab, Ship Today box. Also, look in Customer Maintenance, Routing Tab.

**Sold To:** This section displays the Customers Sold To information from the Customer's Maintenance screen.

**Ship To:** This section displays the Customers Ship To information from the Customer's Maintenance screen. You may enter in an alternate Ship To address if needed.

**Ship Date:** Defaults from Ship Date above. You have the ability to change if needed.

**Route:** Defaults from Customer Maintenance, Routing Tab. You have the ability to change if needed.

**Stop #:** Defaults from Customer Maintenance, Routing Tab. You have the ability to change if needed.

**Terms:** Defaults from Customer Maintenance screen, Credit Tab. You can select alternate terms built in QuickBooks®.

**Disc %:** Defaults from Customer Maintenance, Credit Tab. This is a view only field.

**Customer PO #:** Customers' purchase order number if applicable.

**Sales Rep:** Defaults from Customer Maintenance, General Tab. If you have permission you will be able to change if needed.


**Price Level ID:** Defaults from Customer Maintenance, Credit Tab. Display only.

**Ship Via:** Defaults from Customer Maintenance, General Tab. You have the ability to change if needed.

**Warehouse Ship Button:** Used for Multiple Warehouses for importers and distributors who do not have their own warehouse spaces.

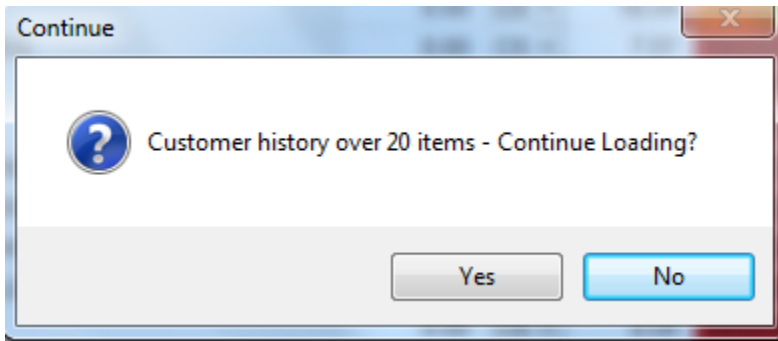
**Fuel Zone ID:** Defaults from Customer Maintenance, General Tab. You have the ability to change if needed.

**Warehouse ID:** Default from Company Setup, Parameters Tab. You have the ability to change if needed.

**Notes:** Will allow you to add notes to the invoice before the first line of items. If you click the  you will be able to choose from the standard notes created in System Maintenance. You may also add your own by typing in the box. This note will only be available for this sales order.

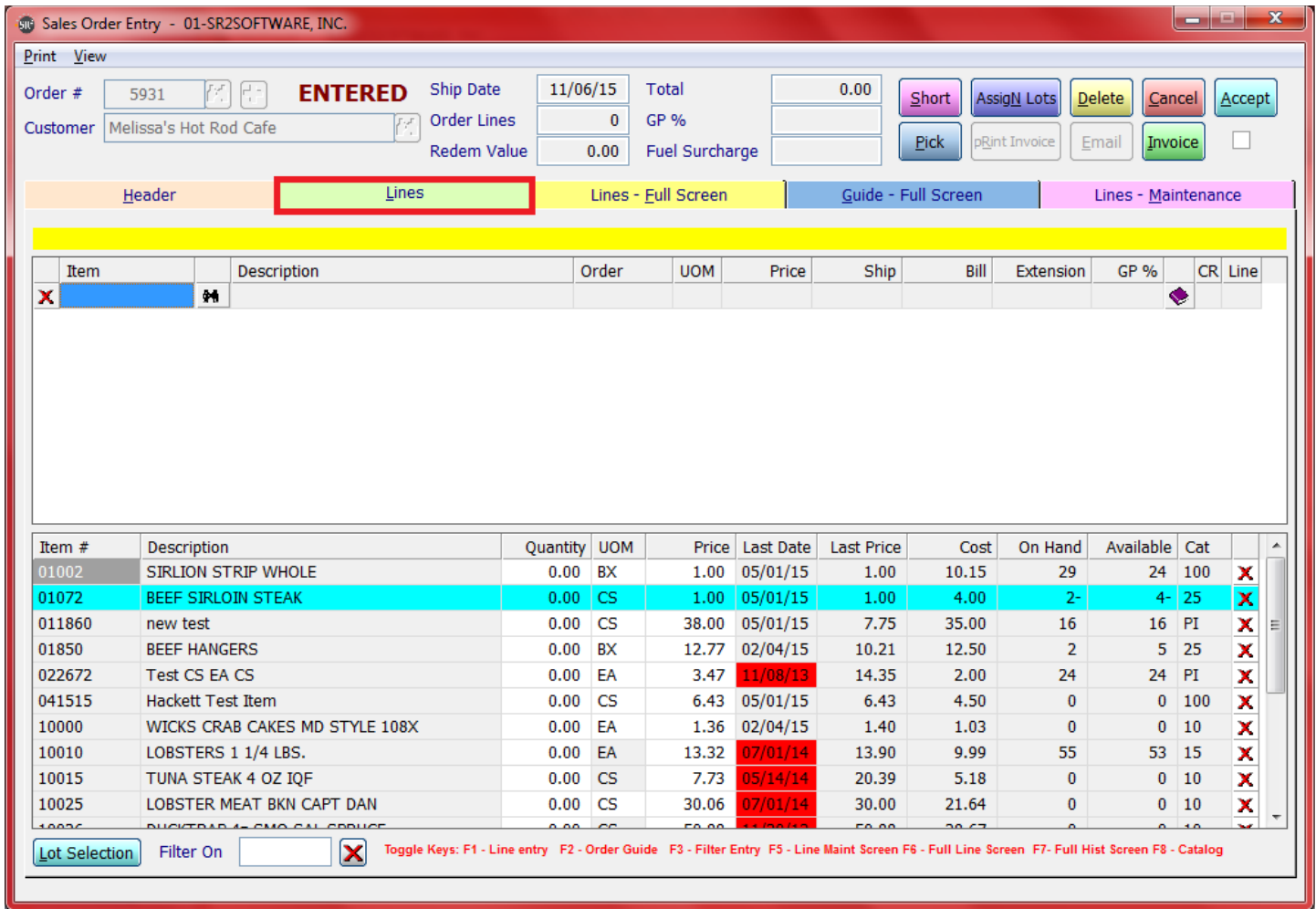
## Lines Tab

When the user chooses the Lines Tab, they may get an informational message:



The number of lines of history to display is controlled by the **Company Setup, Invoice Tab, History Warning** option. The number entered in this field determines the number of days in history to display. **Note:** Zero in this field represents displaying all history. When the number of lines has exceeded the value entered, the user will get an informational message to continue loading all the items or not.

The Lines Tab is where you will be entering the items that you want to place on this order. You have the ability to add items in two different ways. The top of the screen allows you to use the line method; this is where you will type the item in directly. The other is the guide method which is located at the bottom of the screen; this method allows you to enter in the quantity using items that have been previously ordered.



Order Guide is located at the bottom of the screen and will allow the user to rapidly enter orders for customers based on their ordering history.

The Last Price field could either be highlighted yellow or red depending upon the setting in Company Setup, Parameters Tab, History Yellow Days and History Red Days. There is also a setting in Company Setup, Parameters Tab, History Days to Display. Items that are on the current order will be highlighted in Cyan.

The guides area will display the prior Item #, Description, Quantity, Unit of Measure, Current Price, Last Date the item was ordered, Last Price, Cost, On Hand, Available and Item Category.

**On Hand** = Beginning of Day Total.

**Available** = Open Purchase Orders as of the Ship Date Minus Open Orders.

The Quantity column contains zeroes by default. This allows the user to edit the quantity for rapid order entry. The user can also edit the Price and Unit of Measure if it is not grayed out. When the user has selected the quantity of all items in history to be ordered, the user can then click on the line ordering at the top and continue to add more items, or press the Accept Button, or print the Pick Ticket.

The Line Ordering at the top of the screen is where the user would enter in items for the customer's order. If the user chose some items in the guide area, they would display in the line area.

Sales Order Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Print View

Order #  ENTERED Ship Date  Total  Short Assign Lots Delete Cancel Accept

Customer  Order Lines  GP %  Pick Print Invoice Email Invoice

Redem Value  Fuel Surcharge

Header Lines Lines - Full Screen Guide - Full Screen Lines - Maintenance

Item	Description	Order Qty	UOM	Price	Ship	Bill	Extension	GP %	CR	Line
10000	WICKS CRAB CAKES MD STYLE 108X	2.00	CS	143.50	2.00	2.00	287.00	24.04		0001
10025	LOBSTER MEAT BKN CAPT DAN	3.00	CS	28.29	3.00	3.00	84.87	24.00		0002
01535	BRISKET WHOLE RED CORNED	3.00	BX	4.75	3.00	3.00	14.25	26.32		0003

Item #	Description	Quantity	UOM	Price	Last Date	Last Price	Cost	On Hand	Available	Cat	
041515	Hackett	0.00	CS	6.43	04/15/15	6.43	4.50	8-	9-	100	✖
10-2004	ARTIC CHAR 2/4	0.00	LB	12.40	05/17/16	12.40	9.30	89-	89-	43	✖
10000	WICKS CRAB CAKES MD STYLE 108X	0.00	CS	143.50	12/19/16	143.50	109.00	2	5	10	✖
10005	SALMON WHOLE FRESH 12/14	0.00	LB	6.14	05/17/16	6.14	3.10	272	269	15	✖
10015	TUNA STEAK 4 OZ IQF	0.00	CS	6.49	07/02/14	20.39	4.93	130	125	10	✖
10025	LOBSTER MEAT BKN CAPT DAN	0.00	CS	28.29	12/19/16	34.87	21.50	4	2	10	✖
30739	* TYSON FROZ JUMBO WINGS	0.00	CS	85.33	12/19/16	85.33	64.00	1	1	30	✖
96880	swift choice	0.00	BX	1.05	12/19/16	1.05	0.79	1	1	25	✖
INV1	INVENTORY ITEM 1	0.00	EA	3.57	04/25/14	5.00	2.50	9	9	100	✖
INV2	INVENTORY ITEM 2	0.00	CS	14.29	04/25/14	15.00	10.00	10	10	100	✖

Lot Filter On  Toggle Keys: F1-Line entry F2-Order Guide F3-Filter F4-GP Entry F5-Line Maint Screen F6-Full Line Screen F7-Full Hist Screen F8-Catalog

**Item:** The user can enter in the Item ID, use the query  to search for an Item ID, or enter in a partial item name, for example **fillet**, to locate the item using the Rapid Intelligent Search:

After the user chooses the item, they need to enter in the quantity in the Order field. The user would also need to choose the UOM (Unit of Measure) if applicable. The Price field defaults to the price for this customer you may enter a new price if you need to override the default. The Ship field would display the number entered in the Order field. The Bill field will display the quantity based on the billing unit of measure. The Extension field will display the extended price. The GP% field will display the Gross Profit % for this item.

For additional information about the item click on the  at the end of the item line. These fields are display only.

Sales Order Line Detail - 01-SR2SOFTWARE, INC.

Item	20800	SMITH BONELESS RIBEYE	Order Qty	UOM	Ship Qty	Bill Qty	Price	
			1.00	CS	1.00	75.00	6.69	
Pack	Size	Weight	Cost	GP %	On Hand	Available	Last Price	Discount%
5.00	15 LB	75.00	5.15	23.02	23.08	5.28	0.00	0.00

Credit Reason

**On Hand field displays the beginning inventory for the start of the day.**

**Available field displays the amount of items = Open Purchase Orders as of the Ship Date Minus Open Orders.**

**Discount %:** Type the amount of discount you would like to apply to this item.

After the Quantity and Unit of Measure have been entered you need to keep pressing the enter key and that will open a new line so you have the ability to continue to enter more items.

## Lines - Full Screen

The lines full screen tab works the same as the top portion of the lines tab except you have the ability to see more lines of the order. The return button on the bottom will return you to the Lines Tab.

Sales Order Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Print View

Order #  **ENTERED** Ship Date  Total

Customer  Order Lines  GP %

Redem Value  Fuel Surcharge

Header | Lines | **Lines - Full Screen** | Guide - Full Screen | Lines - Maintenance

Item	Description	Order Qty	UOM	Price	Ship	Bill	Extension	GP %	CR	Line
✗ 10000	WICKS CRAB CAKES MD STYLE 108X	2.00	CS	143.50	2.00	2.00	287.00	24.04		0001
✗ 10025	LOBSTER MEAT BKN CAPT DAN	3.00	CS	28.29	3.00	3.00	84.87	24.00		0002
✗ 01535	BRISKET WHOLE RED CORNED	3.00	BX	4.75	3.00	3.00	14.25	26.32		0003
✗										



## Guide Full Screen

The guide full screen tab works the same as the bottom portion of the lines tab except you have the ability to see more lines of history. The return button on the bottom will return you to the Lines Tab.

The screenshot shows the 'Sales Order Entry' window for '01-SR2SOFTWARE, INC. "Developer version - Not for resale"'. The 'Guide - Full Screen' tab is selected. The order is for 'Melissa's Hot Rod Cafe II' with order number 6024. The status is 'ENTERED'. The ship date is 12/19/16. The total is 386.12, GP % is 24.12, and fuel surcharge is 0.00. The order has 3 lines. A 'Return' button is visible at the bottom right.

Item #	Description	Quantity	UOM	Price	Last Date	Last Price	Cost	On Hand	Available	Cat	
041515	Hackett	0.00	CS	6.43	04/15/15	6.43	4.50	8-	9-	100	✘
10-2004	ARTIC CHAR 2/4	0.00	LB	12.40	05/17/16	12.40	9.30	89-	89-	43	✘
10000	WICKS CRAB CAKES MD STYLE 108X	0.00	CS	143.50	12/19/16	143.50	109.00	2	3	10	✘
10005	SALMON WHOLE FRESH 12/14	0.00	LB	6.14	05/17/16	6.14	3.10	272	269	15	✘
10015	TUNA STEAK 4 OZ IQF	0.00	CS	6.49	07/02/14	20.39	4.93	130	125	10	✘
10025	LOBSTER MEAT BKN CAPT DAN	0.00	CS	28.29	12/19/16	34.87	21.50	4	1-	10	✘
30739	* TYSON FROZ JUMBO WINGS	0.00	CS	85.33	12/19/16	85.33	64.00	1	1	30	✘
96880	swift choice	0.00	BX	1.05	12/19/16	1.05	0.79	1	1	25	✘
INV1	INVENTORY ITEM 1	0.00	EA	3.57	04/25/14	5.00	2.50	9	9	100	✘
INV2	INVENTORY ITEM 2	0.00	CS	14.29	04/25/14	15.00	10.00	10	10	100	✘
INV3	INVENTORY ITEM 3	0.00	CS	14.29	04/25/14	15.00	10.00	10	10	100	✘

Once you have entered in all the items for this customer, you may either click the **Accept** button to accept this order and create another sales order or you can click the **Pick** button to print the Pick Ticket.

## Lines - Maintenance

The lines maintenance tab works the same as the top portion of the lines tab except you have the ability to see more lines of the order. This tab will also allow you to make changes to the items and when you press enter instead of moving to the first open line you will move to the next line on the order. This tab is great for modifying orders. The return button on the bottom will return you to the Lines Tab.

Sales Order Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Print View

Order #  **ENTERED** Ship Date  Total

Customer  Order Lines  GP %

Redem Value  Fuel Surcharge

Header | Lines | Lines - Full Screen | Guide - Full Screen | **Lines - Maintenance**

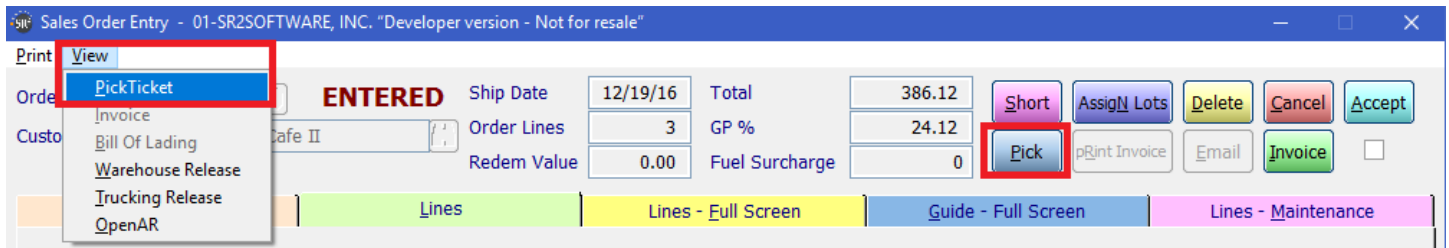
10000 Avail: 3.00 On Hand: 2.00 CS 2.00 CS Commit: 2.00 CS 2.00 CS Last Price: 143.50 Pack: 108.00 Cost: 109.00

Item	Description	Order Qty	UOM	Price	Ship	Bill	Extension	GP %	Line
10000	WICKS CRAB CAKES MD STYLE 108X	2.00	CS	143.50	2.00	2.00		24.04	0001
10025	LOBSTER MEAT BKN CAPT DAN	3.00	CS	28.29	3.00	3.00		24.00	0002
01535	BRISKET WHOLE RED CORNED	3.00	BX	4.75	3.00	3.00		26.32	0003

## Pick Tickets

Once you have completed your order you will need to print the pick ticket for this order so your “pickers” will know what to pick. There are three ways you can print a pick ticket. You may print one pick ticket at a time, print all the pick tickets for the day at once or you can combine all the orders into one pick ticket.

To print a Pick Ticket for one particular order click on the **Pick** Button, or view the Pick Ticket by choosing **View, Pick Ticket**.



## Sample of Pick Ticket

**SR2SOFTWARE, INC.**  
Warehouse: SR2SOFTWARE WAREHOUSE

**\*\* PICK TICKET \*\***  
**6041**

Sold To:  
Melissa's Hot Rod Cafe II  
8 Providence Ave  
  
Cranston RI 02920

Ship To:  
Melissa's Hot Rod Cafe II  
8 Providence Ave  
  
Cranston RI 02920

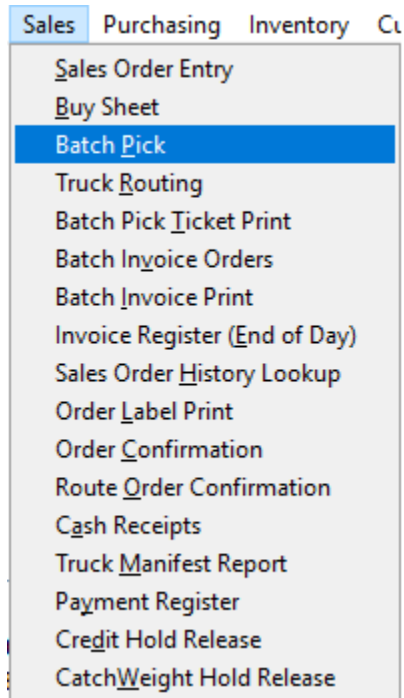
Page: 1

Route/Stop	Ord Date	Ship Date	Ship Via	P. O. #
/ 0	12/19/16	12/19/16	SR2SOFTWARE TRUCK	

Location	Item	Description	Quantity	UM	Pick Weight
	01535	BRISKET WHOLE RED CORNED	3	BX	___
D999-9	10000	WICKS CRAB CAKES MD STYLE 108X Lot: PO0000544710000	2	CS	___
F620-2	10025	LOBSTER MEAT BKN CAPT DAN Lot: new	2	CS	___
G526-1	20800	SMITH BONELESS RIBEYE	3	CS	___
	Wgts:	___	___	___	___

\*\*\* END OF PICK TICKET - # OF ITEMS 4 \*\*\*

## **Batch Pick Report**



The Batch Pick report will allow your warehouse employees the ability to pick all the items for all the orders for the date at one time. This report combines all the orders for the day for the items and prints out one line for the entire total of the item that needs to be picked. This is a great tool for sites with approximately 200 or more orders. The Batch Pick Report also allows the user to print the report again if a customer should happen to call in before the truck left for the day and ordered additional items.

The screenshot shows a software window titled "Batch Pick - 01-SR2SOFTWARE, INC." with the following fields and options:

- Ship Date:** A text box containing "02/13/14" and a calendar icon.
- Route ID:** A text box that is currently empty and a truck icon.
- Page Break:** A dropdown menu currently set to "All".
- Printed Status:** A dropdown menu currently set to "Print All".

Below these fields is a section titled "Report Options" containing several checkboxes:

- Double Space Lines:**
- Break on Route:**
- Include Detail:**
- Include Remarks:**
- Print Customer PO#:**
- Preview Report:**

At the bottom of the window, there is a red warning message: "\* Credit Hold Orders Will NOT be included in report!". Below the warning are two buttons: "Print" and "Excel".

**Ship Date:** Enter in the date of the orders

**Route ID:** Leave Blank for ALL or choose a Truck Route

**Page Break:** None, All, 1, 2, 3. Allows the user to sort by location. 1=1<sup>st</sup> digit; 2=2<sup>nd</sup> digit; 3=3<sup>rd</sup> digit

**Printed Status:** Print All; Un-Printed; Already Printed.

**Print All:** Print all the item (printed and non printed)

**Un-Printed:** Print only items added since last print

**Already Printed:** Only print items that have already been printed

**Double Space Lines:** Check this box if the report should be printed as double spaced

**Break on Route:** If the user chose ALL Routes, they may want to Page Break by Route

**Include Detail:** Check this box if you would like to print the Customer associated to the item

**Include Remarks:** This box will only be available if the user checked the Detail checkbox

**Print Customer PO#:** Print the customer PO number on the pick ticket only available when include detail option is chosen

**Preview Report:** Check this box if you would like to preview the report before you print

**Sample of Batch Pick Report:**

All Routes, No Detail, No Double Spacing, Break on Route, Print All

The report below lists the location of the item, the Item #, the Description of the item, and each Unit of Measure that needs to be picked.

```

BatchPick                               SR2SOFTWARE, INC.                               08/29/13
1-800-214-5045                          Batch Pick List - For 08/09/12                   Page: 4
Route: 06 - West Warwick

Location  Item      Description                                     Sell Units  Alt Units  2nd Alt
-----
01002    SIRLION STRIP WHOLE                          20 BX
01072    BEEF SIRLOIN STEAK                          2 CS        10 EA
*****  LOT #: _____
01156    willie                                        0 CS        10 EA
*****  LOT #: _____
25227    CLIPPED TENDERS 4/10                         0 CS                                     1 LB
    
```

**Sample of Batch Pick Report:**

Double Space Lines, Include Detail, Include Remarks

The screenshot shows a software window titled "Batch Pick - 01-SR2SOFTWARE, INC." with a close button (X) in the top right corner. The window contains several input fields and a "Report Options" section. The "Ship Date" field is set to "02/13/14" with a calendar icon. The "Route ID" field is empty with a truck icon. The "Page Break" dropdown is set to "All". The "Printed Status" dropdown is set to "Print All". The "Report Options" section is enclosed in a box and contains six items, each with a checked checkbox: "Double Space Lines", "Break on Route", "Include Detail", "Include Remarks", "Print Customer PO#" (which is highlighted with a dashed border), and "Preview Report". Below this section, a red asterisk warning reads: "\* Credit Hold Orders Will NOT be included in report!". At the bottom of the window are two buttons: "Print" (blue) and "Excel" (green).

The Batch Pick List will print the Location, Item #, Item Description, and the Units of Measure. Under the item, the report will list the customers associated to the item and the quantity the customer ordered. Since we included the Pick Ticket Remarks, they will also print on the Batch Pick List.

Location	Item	Description	Sell Units	Alt Units	2nd Alt
	01002	SIRLION STRIP WHOLE	20 BX		
**DETAIL**	S5010	SPRING STREET MARKET	985647	20	
	*****	Double Wrapped			
-----					
	01072	BEEF SIRLOIN STEAK	2 CS	10 EA	
**DETAIL**	S5010	SPRING STREET MARKET	985647	40	
	*****	LOT #: _____			
-----					
	01156	willie	0 CS	10 EA	
**DETAIL**	S5010	SPRING STREET MARKET	985647	10	
	*****	LOT #: _____			
-----					
	25227	CLIPPED TENDERS 4/10	0 CS		1 LB
**DETAIL**	B3850	BLUE MOON DINER-B3850			1
-----					

**NOTE:** The user would still be required to print the Pick Tickets so the Trucks can be loaded.

- Sales
- Purchasing
- Inventory
- Cu
- Sales Order Entry
- Buy Sheet
- Batch Pick
- Truck Routing
- Batch Pick Ticket Print**
- Batch Invoice Orders
- Batch Invoice Print
- Invoice Register (End of Day)
- Sales Order History Lookup
- Order Label Print
- Order Confirmation
- Route Order Confirmation
- Cash Receipts
- Truck Manifest Report
- Payment Register
- Credit Hold Release
- CatchWeight Hold Release



## Short Shipping an Order

If the “picker” was not able to fill all the items ordered, click on the **Short Ship** Button.

Sales Order Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Order # 6035 ENTERED Ship Date 12/14/16 Total 8,493.94 Short Assign Lots Delete Cancel Accept

Customer BIG CHEESE PUB-B8210 Order Lines 12 GP % 77.61 Pick Print Invoice Email Invoice

Redem Value 0.00 Fuel Surcharge 0

Short Ship - 01-SR2SOFTWARE, INC. - 6035 "Developer version - Not for resale"

Item ID	Description	UOM	Order Qty	Ship Qty					
01002	SIRLION STRIP WHOLE	BX	2.00	2.00	X	✓	+	-	0002
01002	SIRLION STRIP WHOLE	EA	2.00	2.00	X	✓	+	-	0008
01174	TENDER SR OFF 8oz	CS	2.00	2.00	X	✓	+	-	0003
01174	TENDER SR OFF 8oz	EA	2.00	2.00	X	✓	+	-	0009
01360	Ground Beef	CS	2.00	1.00	X	✓	+	-	0004
01360	Ground Beef	EA	2.00	0.00	X	✓	+	-	0010
02195	LAMB SHANK	BX	2.00	2.00	X	✓	+	-	0005
01360	LAMB SHANK	EA	2.00	1.00	X	✓	+	-	0011
02195	04179 PORK SHANKS 6-7Z	BX	2.00	2.00	X	✓	+	-	0001
04179	04179 PORK SHANKS 6-7Z	EA	20.00	10.00	X	✓	+	-	0007
05517	WILLIAM ITEM	BX	2.00	2.00	X	✓	+	-	0006
05517	WILLIAM ITEM	LB	30.00	30.00	X	✓	+	-	0012

Item # 20251 20800 25227 50168 81635 90460

Lot File

Accept Cancel

Cat 100 X 25 X PI X 50 X 80 X 90 X

**Red X:** Change the Qty Ship to zero.

**Green checkmark:** Reset the field to the original number.

**Green + :** to add quantities. NOTE: this button will not allow the user to order more than the original quantity.

**Red - :** to decrease quantities.

Choose the **Accept** Button to save the changes.

## Short Ship Report

You can print a Short Ship Report with the End Of Day Invoice Register by setting a parameter in Company Setup, Parameters Tab. You can also print the report off the Reports > Sales Menu.

InvRegister  
866-245-6216

SR2SOFTWARE, INC.  
Short Ship Report

07/24/12  
Page: 1

Customer Name	Item #	Description	Qty Ord	SU	Qty Ship
ALOHA PIZZA-A4010	20222	FRESH AUST TENDERLOIN	3.00	CS	0.00
BIG CHEESE PUB-B8210	20800	SMITH BONELESS RIBEYE	2.00	CS	0.00

\*\*\* E N D O F R E P O R T \*\*\*

## Invoicing

Once the items have been “picked” and the trucks have been loaded, you will need to print out invoices for the drivers. The user can print them from the Sales Order screen which will give you the ability to enter in weights, lot assignment or add notes to an invoice before the invoice is printed.

**Note:** The user must click on the **Invoice** Button for the order before you can print an invoice or if no catch weight or lot items are on the invoices you can invoice all the invoices at once..

Enter in the Order # or choose the query button to search for the Order #.

Click on the **Invoice Button** on the right hand side of the screen.

Print View

Order # 5931 **ENTERED** Ship Date 11/06/15 Total 179.35 Short Assign Lots Delete Cancel Accept

Customer Melissa's Hot Rod Cafe Order Lines 4 GP % 11.30 Pick Print Invoice Email Invoice

Redem Value 0.00 Fuel Surcharge 0

Header Lines Lines - Full Screen Guide - Full Screen Lines - Maintenance

The system may prompt the user to enter in weights or lot assignment if the item is a Catch Weight or a lot controlled item. The user needs to enter the information on the screens to print accurate invoices. If you do not enter all the weights in for all the items you will not be allowed to print invoices. You will need to enter the correct number of weights for the items in order to print the invoice.

In the example below, the Smith Boneless Ribeyes are a weighted item.

Catch Weight Entry - 01-SR2SOFTWARE, INC. "Developer version - Not for resale"

Item ID: 20800 SMITH BONELESS RIBEYE

Total Weight: 225.18 Expected Qty: 3.00 Expected Weight: 75.00

Weight: 0.00

	75.20	74.98	75.00							

Accept

Once you have entered in the correct number of weights click the **Accept** button in the bottom right of the screen.

In the example below, the Tuna is a Lot item and the parameter for OE Auto Lot Select is not checked.

Sales Lot Assignment - 10015 - TUNA STEAK 4 OZ IQF

Clear      Quantity Required      5.00      CS

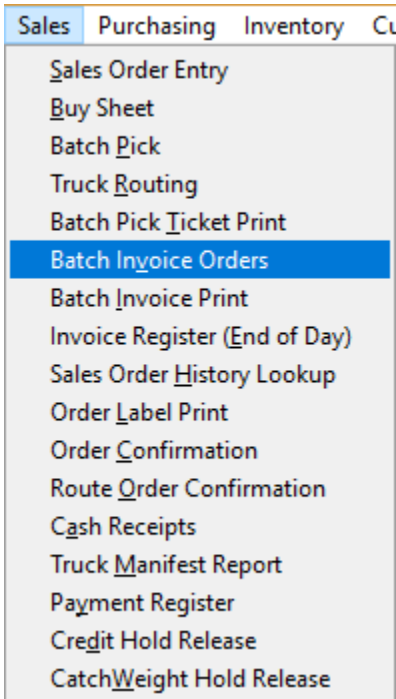
Lot #	Ext Lot #	Warehouse	Received	Expires	Available	Assigned		
PO00002298	AA-001	PFS-CA	10/04/11	12/31/12	38.00	0.00	✓	🗑️
PO00002299	AA-002	SR2	10/04/11	11/25/12	25.00	0.00	✓	🗑️

Open Lots      Not Received - Not Due In Yet      Quantity Balance      5.00  
 All Lots      Not Received - Overdue

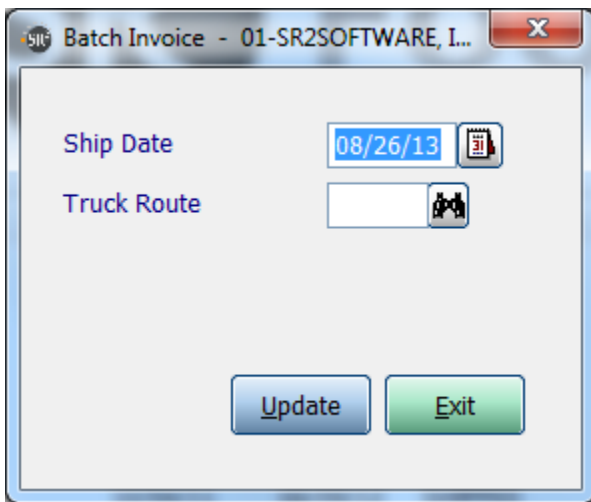
Cancel      Save

Once you have assigned which lot the tuna was picked from click the **Save** button in the bottom right of the screen.

## **Batch Invoice Orders**



If you have no lot controlled items or catch weight items on orders you can batch Invoice your orders instead of opening each order and pressing the invoice button.



**Ship Date:** Choose the date the orders are being shipped on.

**Truck Route:** If you leave blank it will run on all truck routes, or select a particular route to invoice orders on.

Click **Update** to invoice the orders.

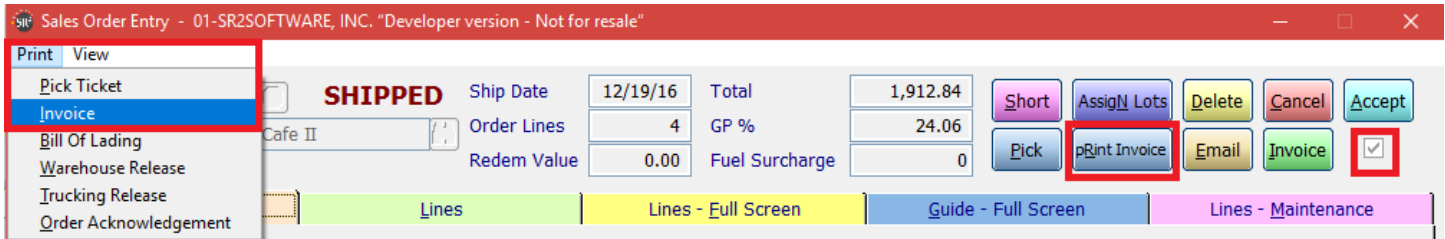
When you click update it will add the checkmark next to the invoice button on sales order entry and change the status from picked to shipped.

## Printing an Invoice

The user can print an Invoice from the Sales Order screen for an individual Order by clicking the **pRint Invoice** Button or by choosing the **Print** menu then choosing **Invoice**.

**Remember:** The **Invoice** Button must be clicked on before an Invoice can be printed.

You can tell if the Invoice Button was clicked by looking at the **check box** next to the Invoice Button.



Sample Standard Laser Invoice:



**SR2SOFTWARE, INC.**

1320 CRANSTON STREET  
 CRANSTON, RI 02920  
 Phone: 1-800-214-5045  
 Fax...: 401-943-7938

**\*\* INVOICE \*\***  
**6041**

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Sold To:

Melissa's Hot Rod Cafe II  
 8 Providence Ave  
 Cranston RI 02920

Ship To:

Melissa's Hot Rod Cafe II  
 8 Providence Ave  
 Cranston RI 02920

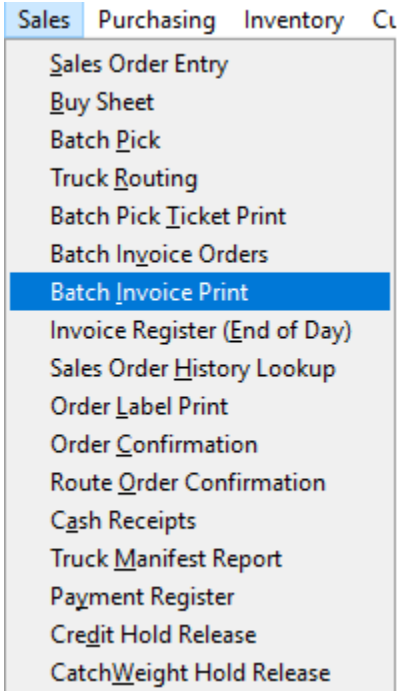
Fax#: 401-943-7938

Route/Stop	Ord Date	Ship Date	Terms	Sales Rep	P. O. #
/ 0	12/19/16	12/19/16	Net 14 Days	Kanda Digby	

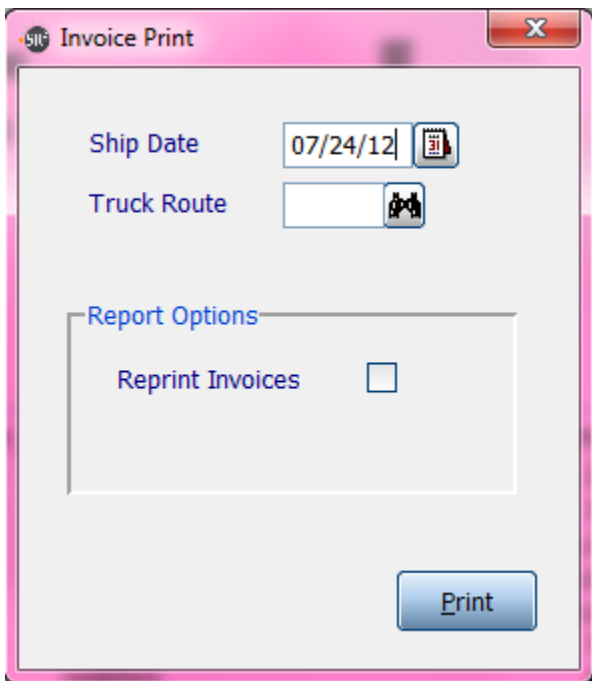
Item	Description	Qty SU	UM	Qty BU	Price	Amount
01535	BRISKET WHOLE RED CORNED	3.00	BX	3.00	4.75	14.25
10000	WICKS CRAB CAKES MD STYLE 108X Lot: PO00005447 Product of USA	2.00	CS	2.00	143.50	287.00
10025	LOBSTER MEAT BRN CAPT DAN Lot: new	3.00	CS	3.00	28.29	84.87
20800	SMITH BONELESS RIBEYE	3.00	CS	225.18	6.78	1526.72
Wgts:		75.20	74.98	75.00		

Thank You--We appreciate your business!

## Batch Invoice Print



You can also print all your Invoices at once by choosing to print in a batch mode. You choose a ship date and you can choose one route or you can print out all the routes



**Reprint Invoices:** Checked will allow you to print invoices for the orders that have already been printed before.