

How To: Manage Orders



By C-Ware, Inc.

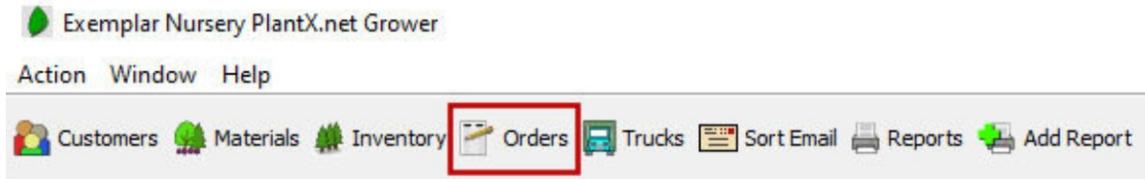


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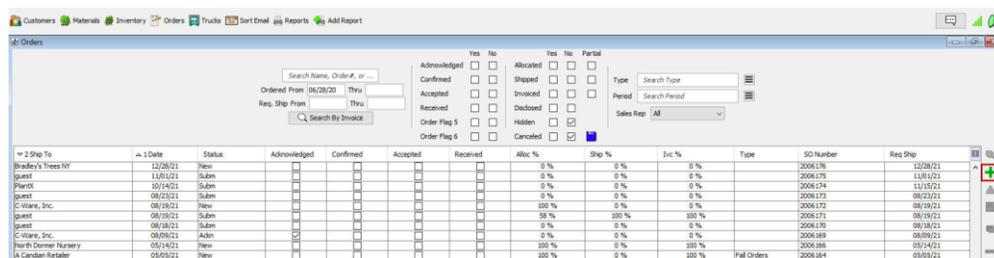
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How to Input Orders

- 1) Select the Orders tab on the top of the page.



- 2) Push the green plus button on the right of the screen.

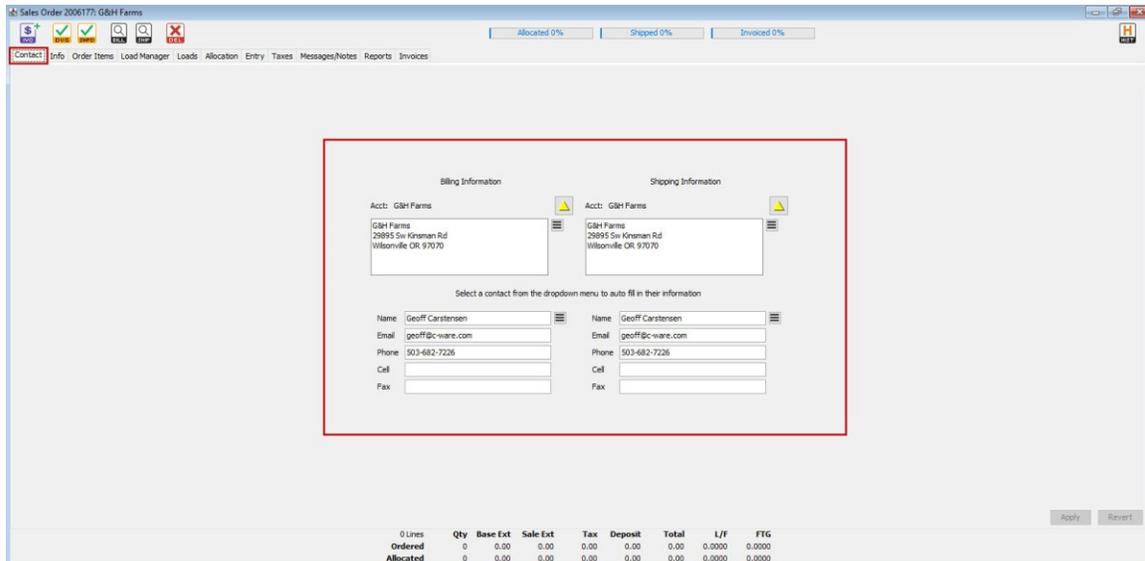


- 3) On the pop-up select the account that the order belongs to and push OK when done.



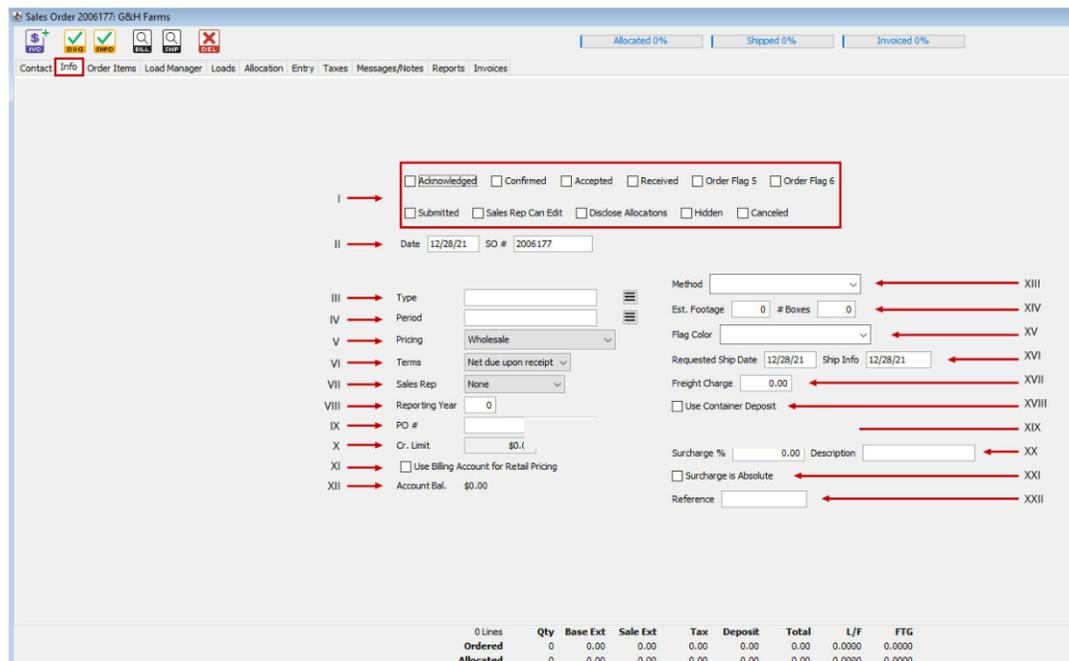
4) Once the order has been created the new order will automatically be opened in a new window to the Contact tab.

5) In the Contact tab the Billing Information and Shipping Information is pulled from the customer account. Ensure that this information is all present and correct.



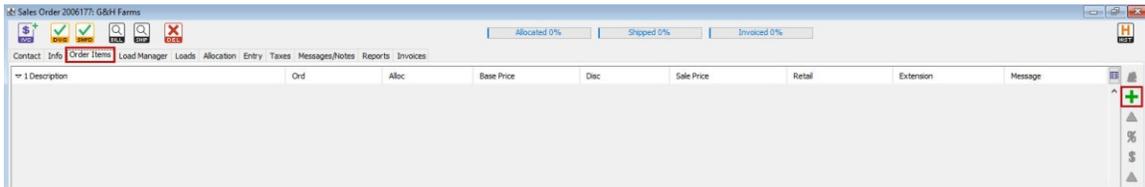
6) Next, select the Info tab.

7) Some information will be automatically filled in from the customer account. The other fields are optional and will have to be manually entered. Push Apply when done.



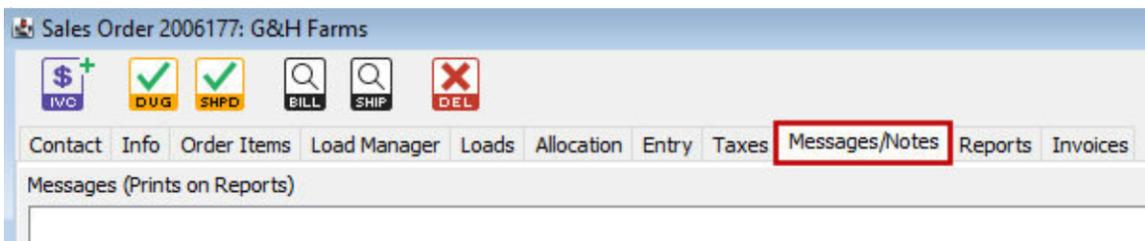
- I) Order Flags: These are used to keep track of the stages of the order.
- II) Date and SO #: The date created and Sales Order Number, automatically generated.
- III) Order Type: Use this to keep track of the type of order, optional.
- IV) Order Period: Use this to keep track of the period of the order, optional.
- V) Pricing: This is the price list this order will use, automatically pulled from customer account.
- VI) Terms: This is the payment terms for this order, automatically pulled from customer account.
- VII) Sales Rep: Sales Rep for this order, automatically pulled from customer account.
- VIII) Reporting Year: Automatically 0 unless changed.
- IX) PO #: Purchase Order Number, Optional.
- X) Cr. Limit: Credit Limit, automatically pulled from customer account.
- XI) Use Billing Account for Retail Pricing: If checked will use billing account for customer retail information.
- XII) Account Bal.: Account Balance is automatically pulled from customer account.
- XIII) Ship Method: How this order is getting to the customer, optional.
- XIV) Est. Footage and # Boxes: If you would like to estimate footage and boxes, optional.
- XV) Flag Color: Can be used to color code orders, optional.
- XVI) Requested Ship Date and Ship Info: The date the customer wants the order and notes related to shipping, auto filled with created date, optional.
- XVII) Freight Charge: Dollar amount for freight, optional.
- XVIII) Use Container Deposit: Automatically pulled from customer account.
- XIX) Per Tag Rate: Dollar amount per tag, optional.
- XX) Surcharge % and Description: Miscellaneous charge field based on percent. For example, 3% credit card fee.
- XXI) Surcharge is Absolute: Turns Surcharge % into a dollar amount.

- 8) Select the Order Items tab.
- 9) Push the green plus button on the right of the screen.



- 10) On the pop-up choose the catalog item ordered from the list. Push OK when done.
- 11) On the new pop-up enter the quantity ordered, everything else should be automatically populated, ensure that all other fields are accurate.

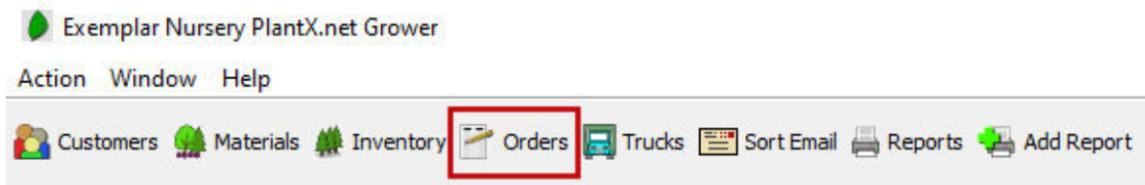
- 12) Repeat steps 9-11 for all items ordered. *This would be a good time to update order flags in the Info tab*
- 13) Select the Messages/Notes tab.



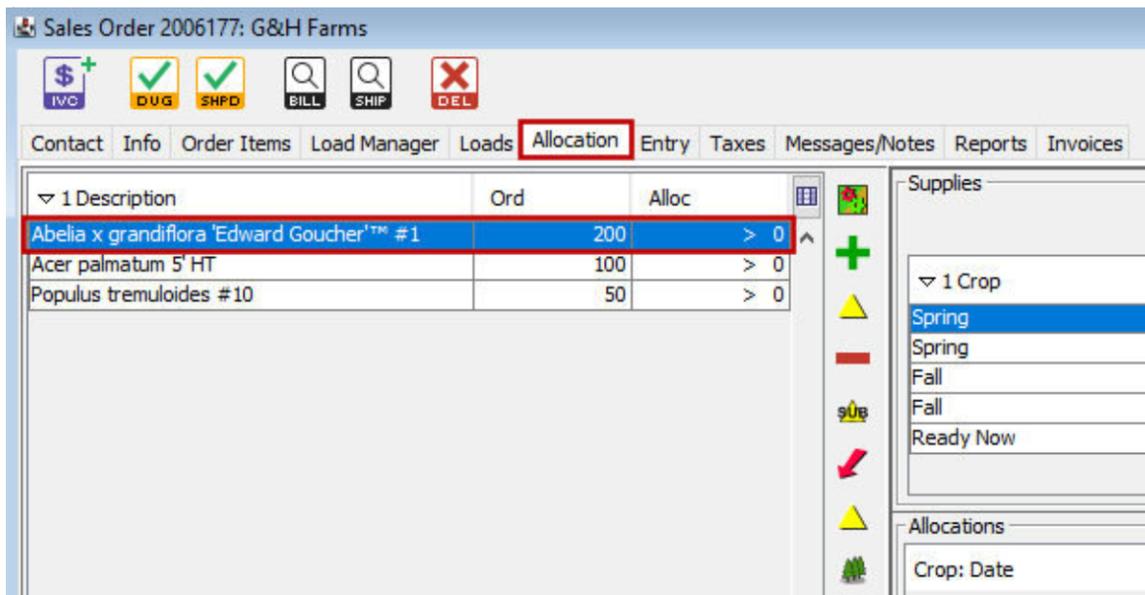
- 14) Enter messages to have it print on reports or enter notes if you do not want customers to see.

How to Allocate Orders

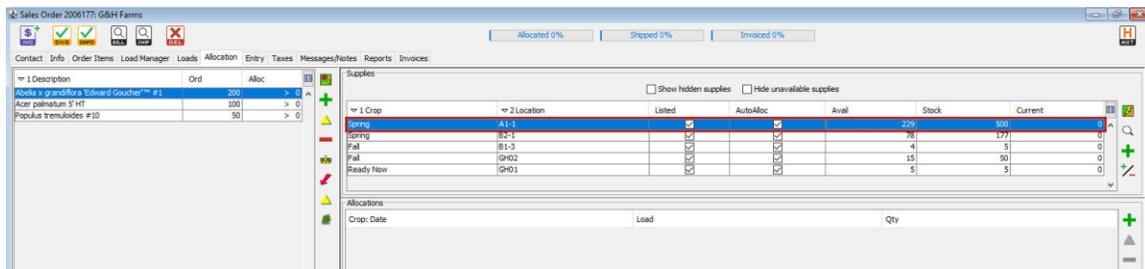
- 1) Select the Orders tab on the top of the page.



- 2) Select the order you would like to Allocate from the list.
- 3) Next select the Allocation tab.
- 4) Select an order item from the list on the left.



- 5) Select the supply you would like to allocate plants from, from the list on the right.



6) To automatically allocate 100% of the ordered item push the Quick Allocate Button on the top right.

1 Crop	2 Location	Listed	AutoAlloc	Avail	Stock	Current
Spring	A1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	229	500	0
Spring	B2-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	78	177	0
Fall	B1-3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	5	0
Fall	GH02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	15	50	0
Ready Now	GH01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	5	0

7) To allocate anything other than 100% of the order push the green plus on the lower right of the screen.

1 Crop	2 Location	Listed	AutoAlloc	Avail	Stock	Current
Spring	A1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	229	500	0
Spring	B2-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	78	177	0
Fall	B1-3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	5	0
Fall	GH02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	15	50	0
Ready Now	GH01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	5	0

Crop	Date	Load	Qty

8) On the pop-up enter the number you would like to allocate to this order and push OK when done.

Allocation

Available: 229

Ordered: 200

Allocate: 150

Purchased:

Load:

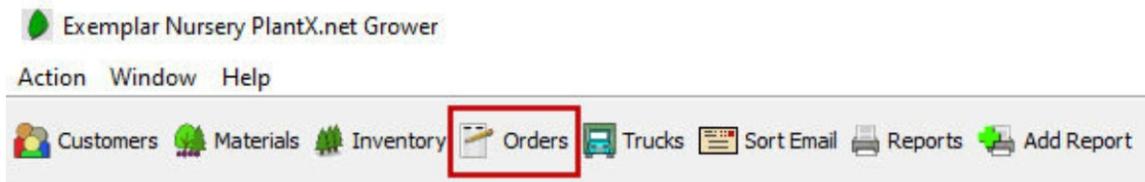
<None>

OK Cancel

9) Repeat steps 4-8 for all order items. *This would be a good time to update order flags in the Info tab*

How to Manage Loads

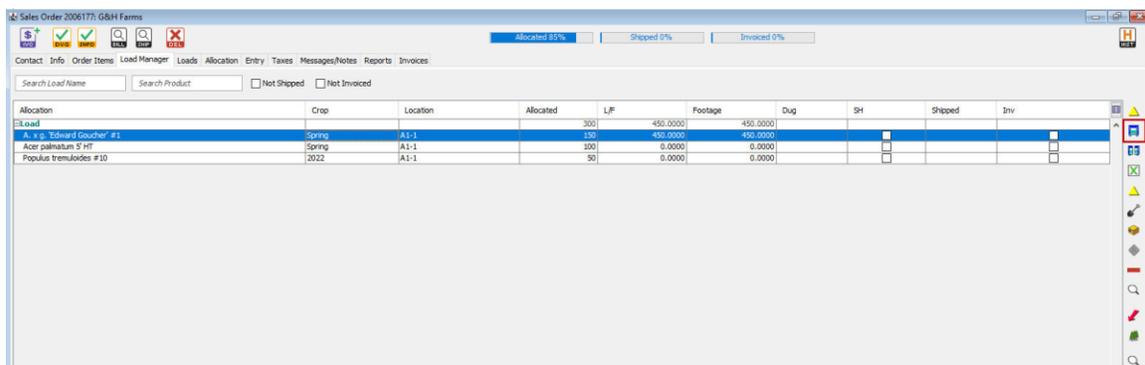
- 1) Select the Orders tab on the top of the page.



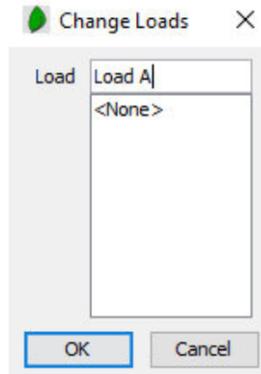
- 2) Select the order you would like to ship from the list.
- 3) Next select the Load Manager tab. In these next steps the goal is to separate this order into shippable parts.



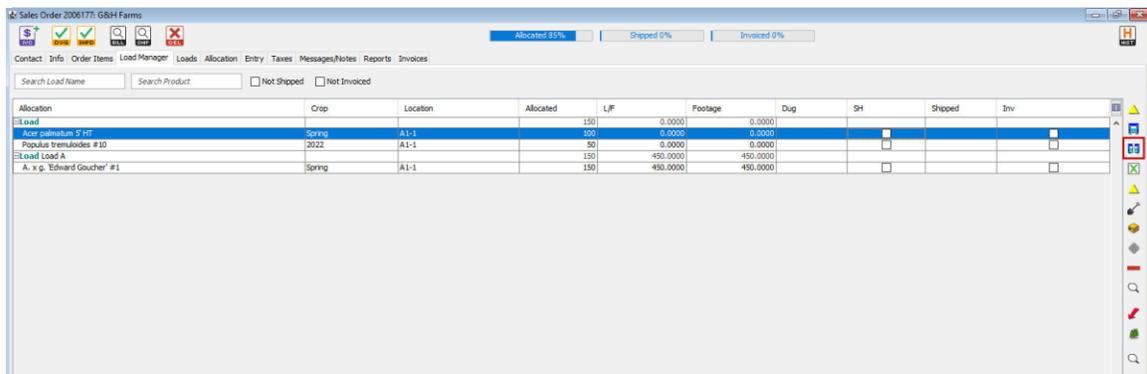
- 4) Select one of the allocated items from the list. (If you would like to add multiple items to one load you can select multiple items and complete the following steps.)
- 5) Select the change loads button.



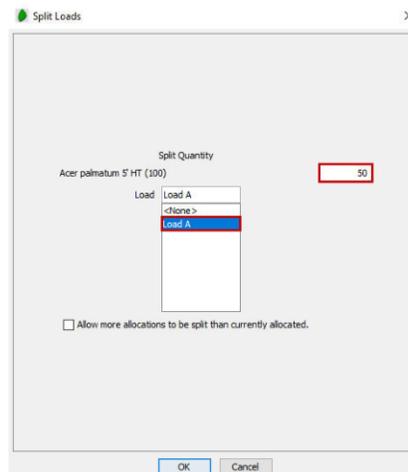
6) On the pop-up type in a new load name or choose from an existing load and push OK when done.



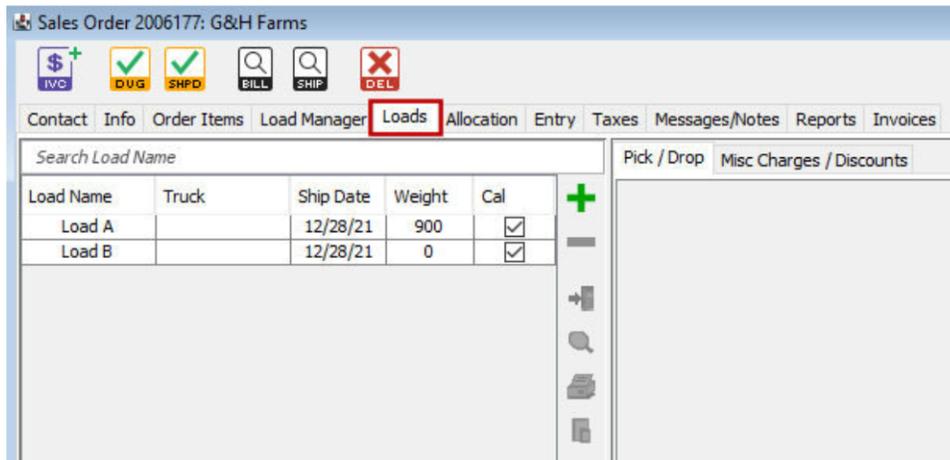
7) To separate one item to multiple loads, select one item from the list and push the split loads button.



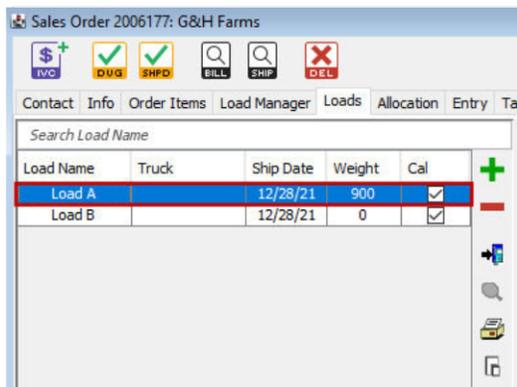
8) On the pop-up enter the number you would like to separate out and the load you would like to add it to. Push OK when done.



- 9) Repeat steps 4-8 until all allocated items have been assigned to a load.
- 10) Select the Loads tab.



- 11) Select a load from the list on the left. On the bottom left of the screen you can edit the load information.



I Load Name

II Show on Calendar

III Truck

IV Ship Date

V Est. Footage Calc = 450.0000'

VI # Boxes

VII Add'l Weight Lbs

VIII Freight Add to Invoice IX

X PO Number

Apply Revert

- I) Load Name: This is the name of the load; this can be changed here.
- II) Show on Calendar: If checked the load will appear on the calendar app.
- III) Truck: If the load is assigned to a truck, it will show here, the load can also be assigned to an existing truck here. (Leave blank if truck does not exist yet.)
- IV) Ship Date: The load's ship date.
- V) Est. Footage: This is the estimated footage the load will take up.
- VI) # Boxes: If you use boxes input the number here.
- VII) Add'l Weight: Here you can add additional pounds to the load.
- VIII) Freight: The dollar amount for freight.
- IX) Add to Invoice: If this is checked it will add the freight cost to the Invoice.
- X) PO Number: The load can carry a PO Number that is separate from the order.

12) Next ensure that the automatically filled in information on the right is correct in the Pick/Drop tab.

Pick / Drop Misc Charges / Discounts

Pick-up Stop
Address 12345 NW Spring Rd
Someville, OR 97070
Name
Title
Phone
Fax
Cell
Other
Email

Drop-off Stop
Address G&H Farms
29895 Sw Kinsman Rd
Wilsonville OR 97070
Name Geoff Carstensen
Title
Phone 503-682-7226
Fax
Cell
Other
Email geoff@c-ware.com

Notes
Directions

13) Select the Misc Charges/ Discounts tab.

14) Here you can add other charges/discounts such as fees, pallets, or a special discount. Push the top green plus button to add a charge.

Acct	Description	Quantity	Price	Amount	Net Price	Tax Exempt

15) On the pop-up fill in all information and push OK when done.

Misc Charge

Chart Acct 40200: Pallet Charge

Description Pallet Charge

Quantity 2 optional
Price 50.00 optional
Amount 100.00 required

Net Price (no terms discounts)
 Tax Exempt

OK Cancel

16) Push the second green plus button to add a misc. discount.

Pick / Drop Misc Charges / Discounts							
Acct	Description	Quantity	Price	Amount	Net Price	Tax Exempt	
48000	Discount - Winter Code	0	\$0.00		-\$25.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
40200	Pallet Charge	2	\$50.00		\$100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

17) Fill in all information on the pop-up and push OK when done.

Misc Discount [X]

Chart Acct: 48000: Discount

Description: Discount - Winter Code

Quantity: optional

Price: optional

Amount: required

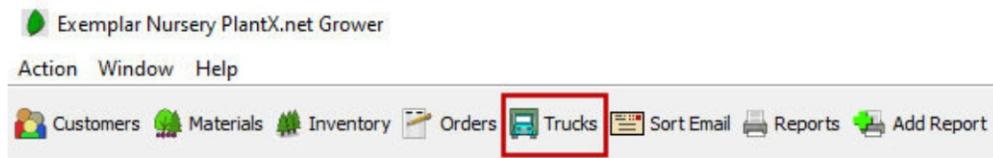
Net Price (no terms discounts)

Tax Exempt

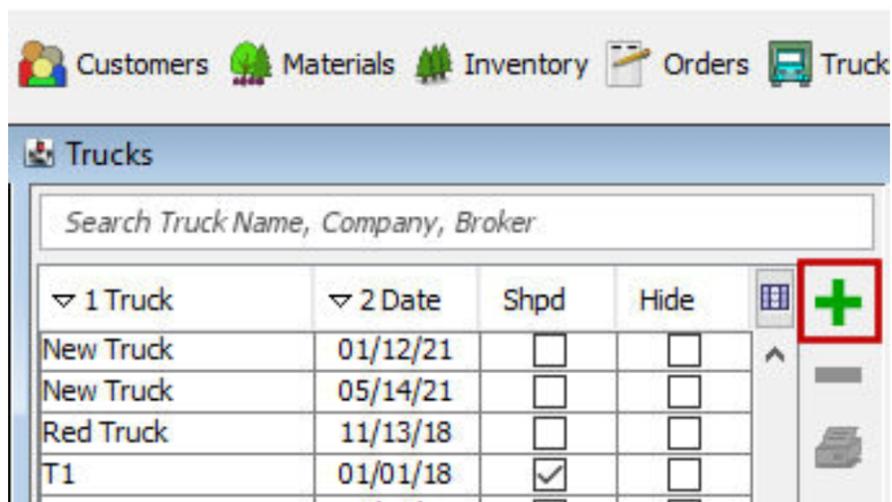
18) Repeat steps 11-17 for all loads.

How to Ship

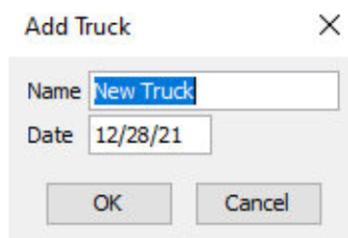
- 1) Select the Trucks tab at the top of the screen.



- 2) Push the green plus button on the left side of the screen.



- 3) On the pop-up enter the truck name and date.



4) Select the new truck from the list and enter the information at the bottom of the screen and push apply when done.

I) Name and Date: The name of the truck can be changed here and the ship date.

II) Company: This is where to input the name of the trucking company.

III) Broker: If you have a broker this is where their name goes.

IV) Cost: The cost of the truck.

V) Flag Color: If you use colors to flag your trucks input that here.

VI) Shipped: Check this if the truck has shipped.

VII) Hide: Check this to hide this truck.

VIII) Internal Notes: This is where to enter notes for internal use.

The screenshot shows a software window titled "Trucks". At the top, there is a search bar labeled "Search Truck Name, Company, Broker". Below the search bar is a table with columns: "1 Truck", "2 Date", "Shpd", and "Hide". The table contains 15 rows of truck data. The row for "Truck A" is highlighted in blue. Below the table is a form for editing the selected truck. The form fields are: Name (Truck A), Date (12/28/21), Company, Broker, Cost (0.00), Flag Color, Shipped (checkbox), Hide (checkbox), and Internal Notes (text area). At the bottom of the form are "Apply" and "Revert" buttons.

1 Truck	2 Date	Shpd	Hide
New Truck	01/12/21	<input type="checkbox"/>	<input type="checkbox"/>
New Truck	05/14/21	<input type="checkbox"/>	<input type="checkbox"/>
Red Truck	11/13/18	<input type="checkbox"/>	<input type="checkbox"/>
T1	01/01/18	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T10	05/10/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T12	03/15/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T13	02/21/17	<input type="checkbox"/>	<input type="checkbox"/>
T14	02/01/17	<input type="checkbox"/>	<input type="checkbox"/>
T2	12/26/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T5	11/15/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T6	06/12/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 001	01/15/17	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 002	01/01/21	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 003	10/03/16	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 004	08/23/16	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 005	07/08/16	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Truck 006	06/05/16	<input type="checkbox"/>	<input type="checkbox"/>
Truck 007	04/01/16	<input type="checkbox"/>	<input type="checkbox"/>
Truck 008	03/27/16	<input type="checkbox"/>	<input type="checkbox"/>
Truck 009	01/12/16	<input type="checkbox"/>	<input type="checkbox"/>
Truck A	12/28/21	<input type="checkbox"/>	<input type="checkbox"/>

Name: Truck A Date: 12/28/21

Company:

Broker:

Cost: 0.00

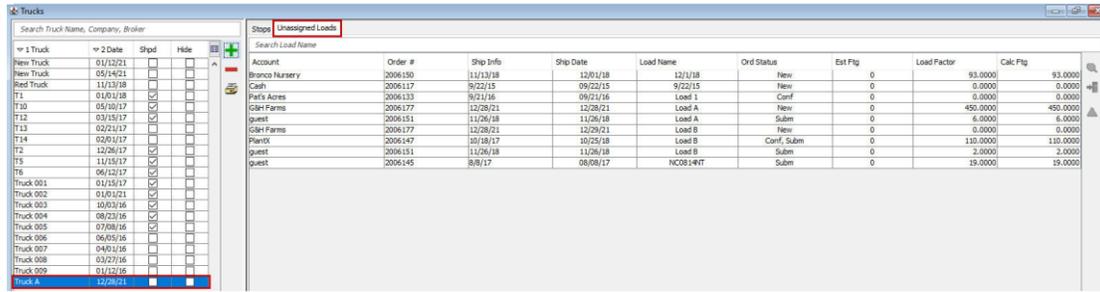
Flag Color:

Shipped Hide

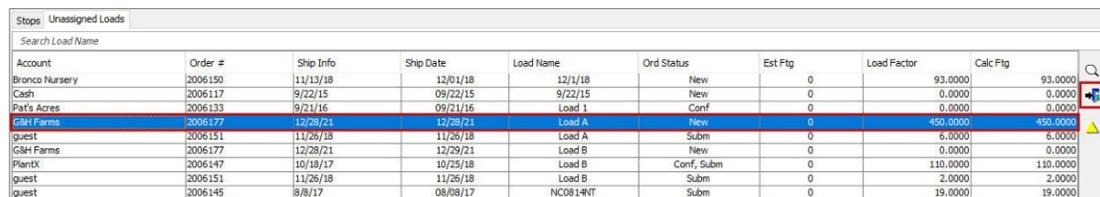
Internal Notes:

Apply Revert

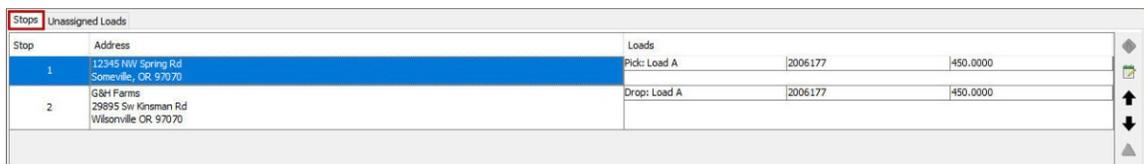
- With this truck still selected click the Unassigned Loads tab on the right.



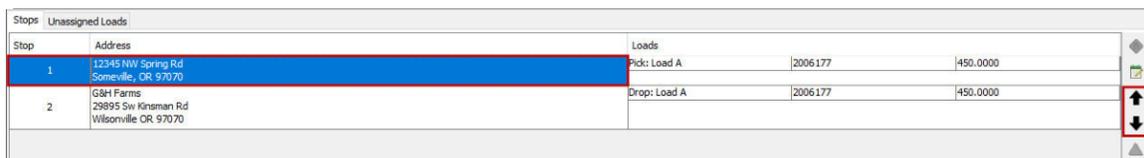
- Select a load from the list and push the assign to truck button.



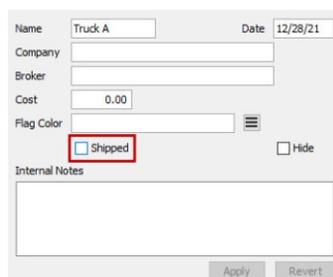
- Repeat step 6 for all loads belonging to this truck.
- Next select the Stops tab.



- Here all stops for this truck should be automatically entered, to edit the order of the stops select a stop and use the arrows.

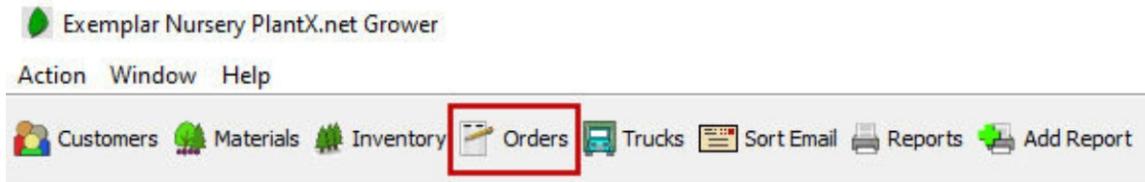


- Once the truck has been shipped, click the shipped check mark on the bottom left.

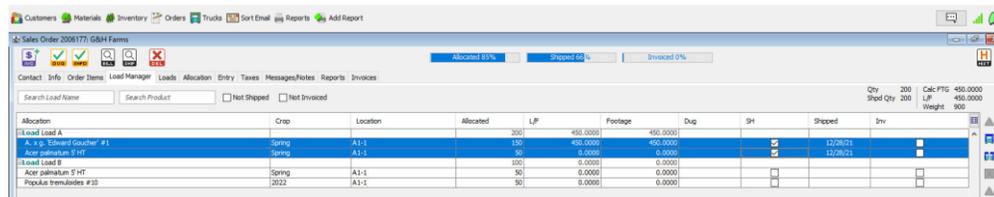


How to Create an Invoice

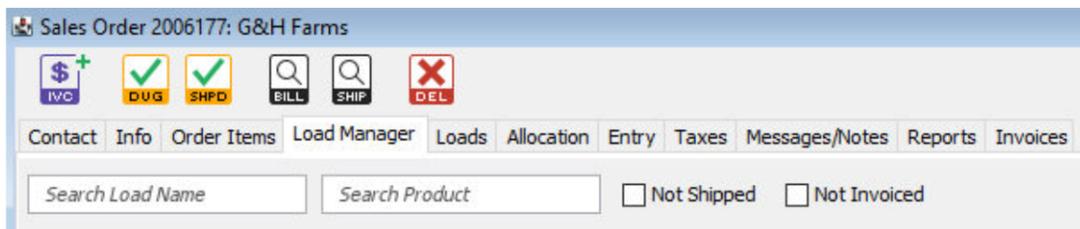
- 1) Select the Orders tab at the top of the page.



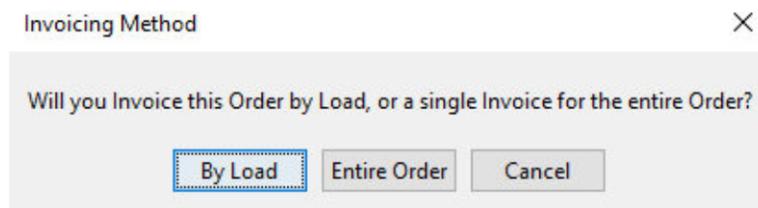
- 2) Select the order you would like to create an invoice for from the list on the left.
- 3) Next select the Load Manager tab. Here you want to ensure that the order has been marked as shipped.



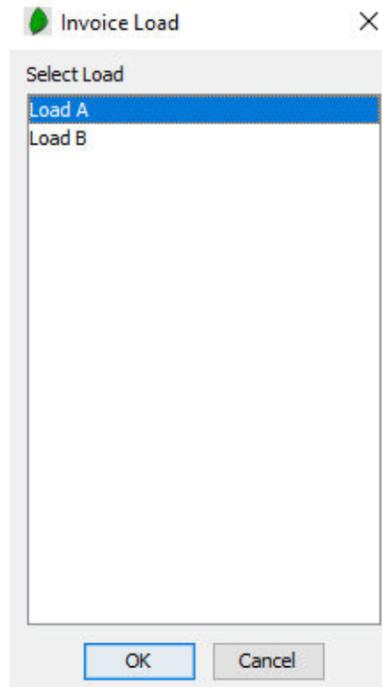
- 4) Click the purple Create/Update Invoice button.



- 5) On the pop-up select the By Load button.



6) On the new pop-up select the load you would like to invoice and push OK when done.



7) The invoice will automatically populate and show up on the screen in a new window. Ensure that all information is correct.

Invoice 2006056 for G&H Farms

Main Contact Sales Rep Marketing Messages

Date: 12/28/21 Pfr: 2021 Document #: 2006056

Notes: Order #2006177 Load A PO Number:

Terms: Net due upon receipt Due Date: 12/28/21

Account #	Account	Note	Debit	Credit	Qty	Price	Net	Item	Summary	Cleared
40000	Sales	Abelia x grandiflora 'Edward Goucher'™ #1	\$0.00	\$1,312.50	150	\$8.75		6672427		
48000	Discount	Discount: 10%	\$130.50	\$0.00	150	\$0.87		6672427		
40000	Sales	Acer palmatum 5 HT	\$0.00	\$4,000.00	50	\$80.00		6672430		
48000	Discount	Discount: 10%	\$400.00	\$0.00	50	\$8.00		6672430		
40100	Delivery	Delivery Charge	\$0.00	\$250.00	0	\$0.00				
40200	Pallet Charge	Pallet Charge	\$0.00	\$100.00	2	\$50.00				
48000	Discount	Discount - Winter Code	\$25.00	\$0.00	0	\$0.00				
2628634	G&H Farms	Balance	\$5,107.00	\$0.00	0	\$0.00				