Reseller ADVantage©

Sales and Purchase Order Management

In ***Reseller Advantage***, Sales Orders begin when a sales rep turns a quote into a Sales Order via the deal workbook's Create Order pushbutton. The Orders tab is only visible to users with create order security.

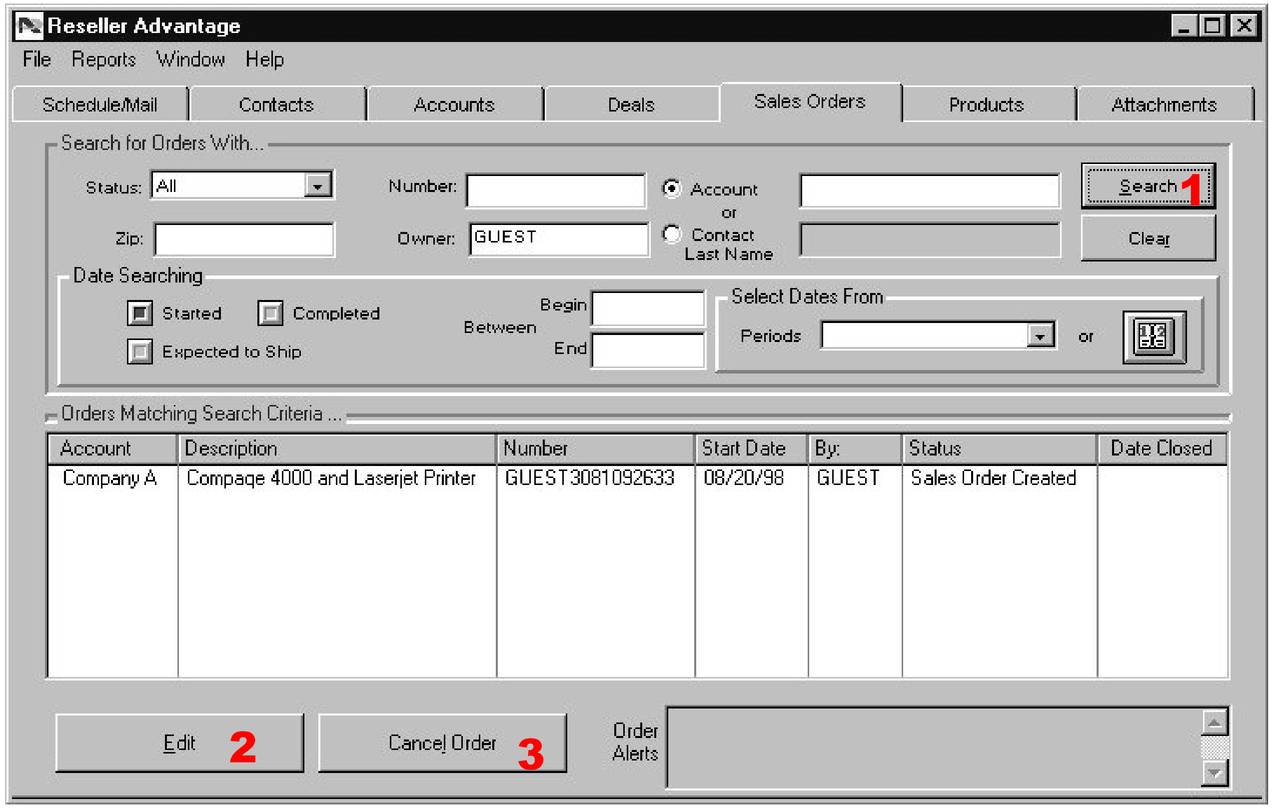
1. From the Orders tab you can easily generate a listing of all of your new orders. **(1)** As with Contacts, Accounts and Deals, complete search functions are provided so that you can find orders in areas of the country, by specific companies or contacts (both internal and external) and by date searching.

2. To edit a Sales Order highlight it and click the Edit button or double click the sales order.

3. To cancel a Sales Order highlight it and click the Cancel Order button. An error is displayed if any of the Sales Order's products have been placed on a PO. They must be removed from the PO before the Sales Order can be canceled.

The best way to understand how the order process works is to see you how it is done.

To do that, click on the Edit button, and the Order Workbook opens up......



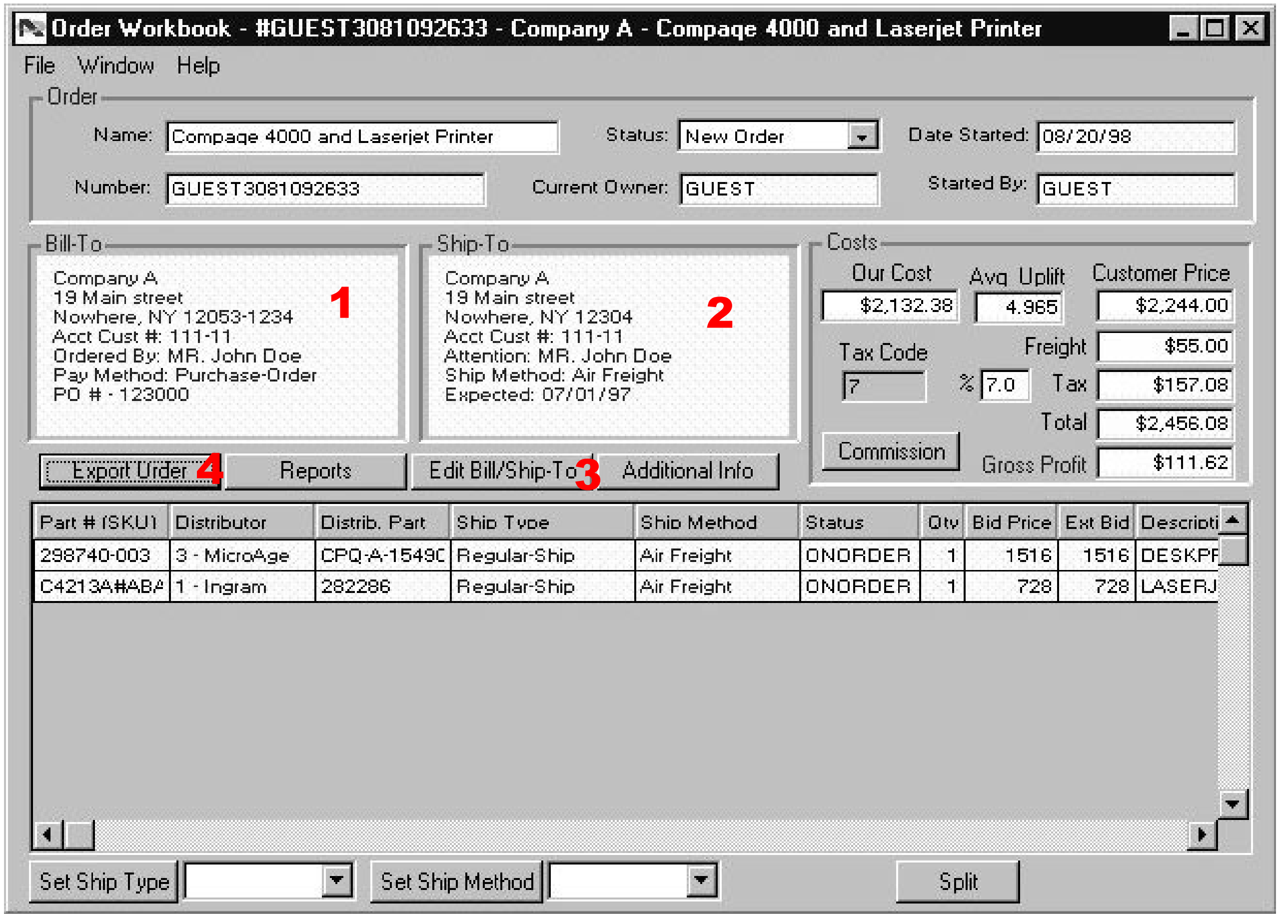
Processing an Order involves reviewing the information entered by the sales rep and handling errors from the order process. Included are the following steps:

1. **Review Customer Bill-to** *Information by* identifying,selecting and assigning Bill-to account, Bill-to account address, Ordered By, payment methods and Customer PO # or Credit Card #.

2. **Review Customer Ship-to** *Information by* identifying,selecting and assigning attention to, shipping methods, shipping costs, partial shipment option and any special shipping instructions.

3. **Edit Bill/Ship-To** - click this button for access to all the billing and shipping information.

4. **Export the Order** - clicking the Export Order button verifies the sales order information and writes the sales order information to an output file for importing into your accounting system. We currently support Quickbooks and Peachtree formats as well a a generic Reseller Advantage format.



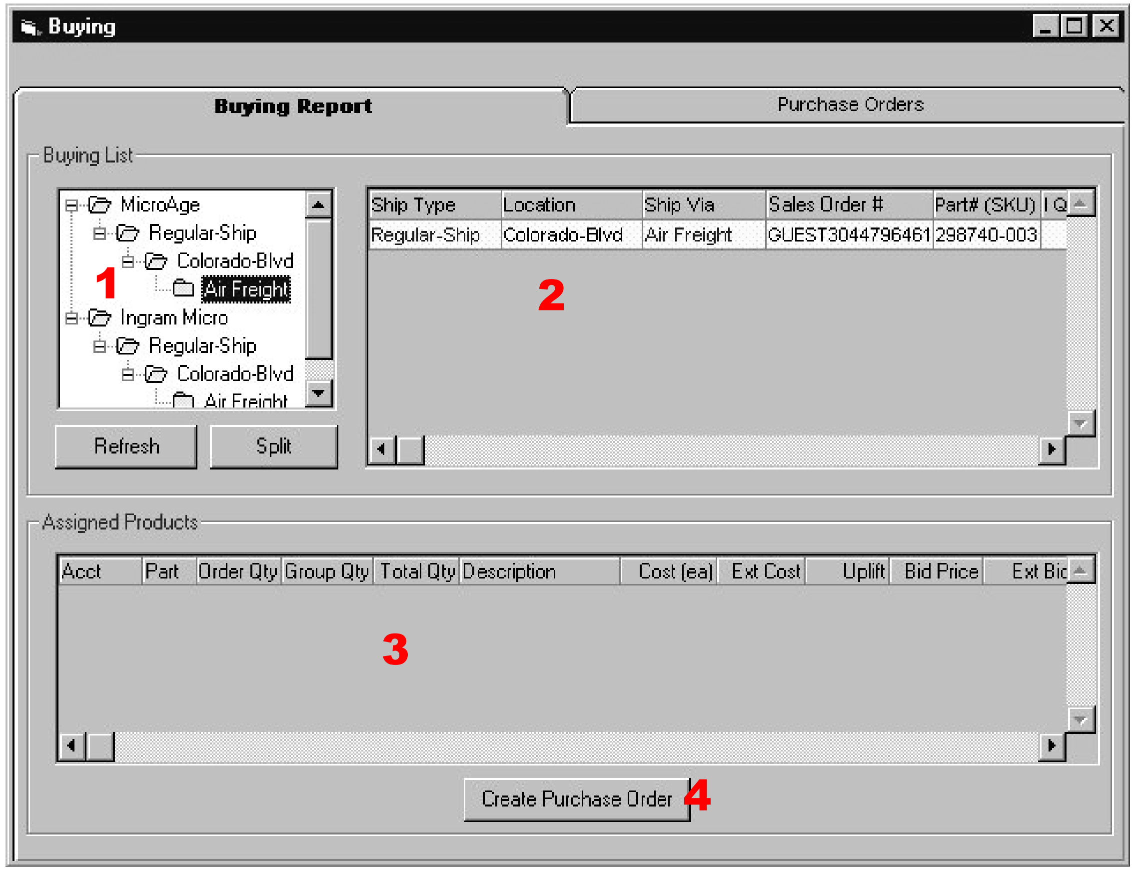
Once the accounting system sales order is created all no-stock products will show up here for purchasing. The process includes the following steps:

1. Distributors Hierarchy -Each Distributor that has products to be ordered will show up here. Double clicking on a Distributor shows all the unique Ship Types for this distributor. Double clicking a ship type shows all unique locations (Branches for Regular Ship or Company names for Drop Ship) and double clicking on a location shows all the unique ship via's (Overnight, UPS 2 Day, etc.).

2. Hierarchy Products - Select any level of the hierarchy and all products for that level and any lower level will be displayed

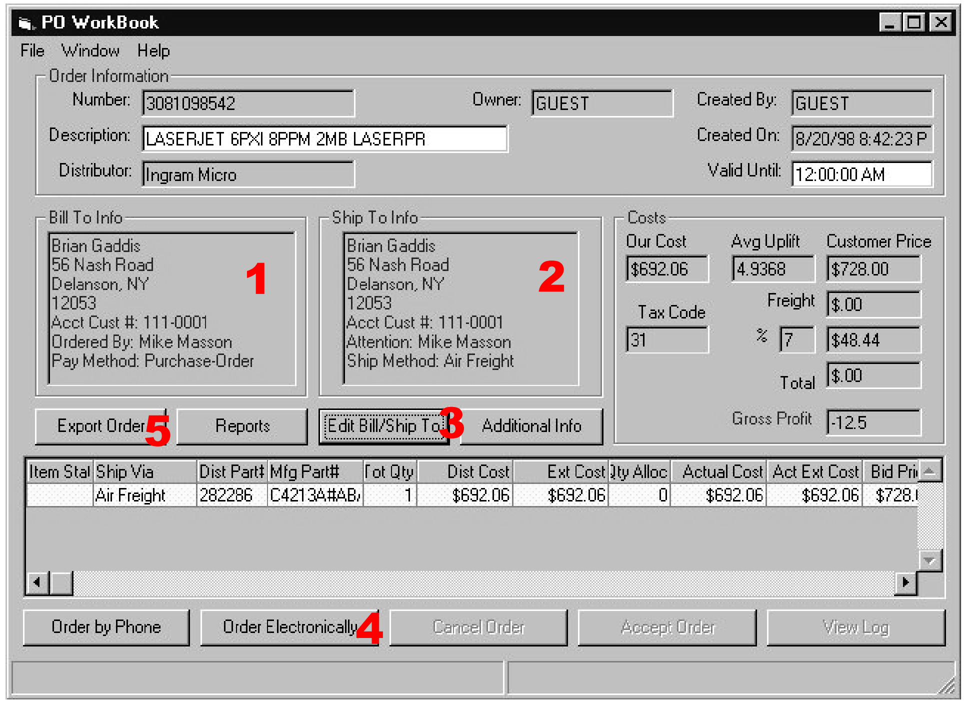
3. Assigning Products - Products can be selected into a Purchase Order by double clicking on the desired product. T*he bottom list box* **(3)**, contains all products to be placed on a PO. If you try to mix products from different levels of the Distributor hierarchy you will receive an error message.

4. Create Purchase Order - Once all the products are selected a purchase order can be created by clicking on the Create Purchase Order button. This opens the PO Workbook so products can be electronically ordered from the distributor via their on-line system. If the distributor does not provide an on-line system then a phone order is placed and the products are manually updated with the actual order information. You can access any PO using the searching functions on the purchase order tab.



When an item is selected it is verified to ensure no other administrator has selected it. Once verified it is then updated to show that it has been selected. Once selected a user may not leave this page until a purchase order is created or the items are de-selected.

Processing a Purchase Order involves reviewing/entering the Billing and Shipping information and handling errors from the purchasing process. Included are the following steps:



1. Review Customer Bill-to *Information by* identifying,selecting and assigning Bill-to account, Bill-to account address, Ordered By, payment methods and Credit Card #.

Bill-to information is set based on the ship type. If ship type is ITT (Direct Fulfillment) then the bill-to information is set to the sales orders billing information. If the ship type is **not** ITT then the bill-to information is set to your companies default bill-to information.

2. Review Customer Ship-to *Information by* identifying,selecting and assigning attention to, shipping methods, shipping costs, partial shipment option and any special shipping instructions.

Ship-to information is set based on the ship type. If ship type is Drop Ship then the ship-to information is set to the sales orders shipping information. If the ship type is **not** Drop Ship then the ship-to information is set to your companies default ship-to information.

3. Edit Bill/Ship-To - click this button for access to all the billing and shipping information.

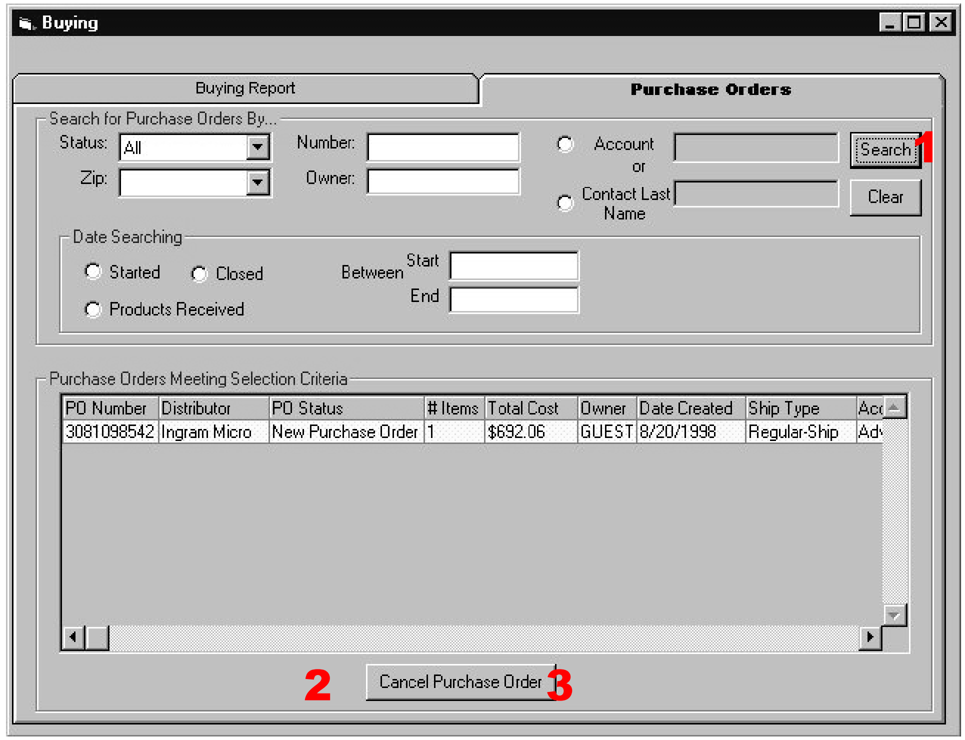
4. Purchase the Products - If you have access to the internet and the distributor has an electronic ordering system then you can click the Order Electronically button. This will automatically feed all the PO information to the distributor and order the products. Any errors, such as invalid part number, etc. are displayed in the order progress dialog. If you do not have access to the internet or the distributor does not support electronic ordering then you click the Order by Phone button and the Actual Cost, Qty Alloc and Qty B/O fields are opened for input. Based on the phone order fill these fields with the correct information. Once the order process is complete you click the Accept Order button to finalize the order which locks all the fields.

5. Export the Purchase Order - Once all the products have been ordered you click the Export PO button which writes the purchase order information to an output file for importing into your accounting system. We currently support Quickbooks and Peachtree formats as well a a generic Reseller Advantage format.

1. All New Purchase Orders can be retrieved by clicking the Search button. **(1)** As with Contacts and Accounts, complete search functions are provided so that you can find purchase orders in areas of the country, by specific companies or contacts (both internal and external) and by date searching.

2. To edit a purchase order highlight the PO and click the Edit button or double click on the PO the PO workbook is displayed for PO processing.

3. To cancel a purchase order highlight the PO and click the Cancel Purchase Order button. If the PO has already been ordered you will be asked to confirm that the order to the distributor was cancelled.



Order, Buying and PO Management Feedback

Concerns and Suggestions

From:

Company:

Date:

Please fax to (518) 872-9137