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		Available Credit		0.00				Warehouse Pre-Pa	id
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Slide notes: In this tutorial we look at how we convert a Quotation into an Indent Order. First we retrieve the Customer profile.

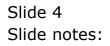
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Find Cust?	Name	GRABOWSKI, THERE	ESA	CRM	00492	Do Sale: -	<u>Cashier</u>
Sales Code	Account	07306		Club			Sale
Cust Ord#	Account Balance	6	6,639.27	Expiry		>>	Order
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	Available Credit	993	3,360.73			W	arehouse Pre-Paid
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Slide notes: Then we choose FUNCTIONS.

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Slide notes: Then we choose 'Save / Retrieve / Create'.

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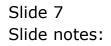
# Slide 5 Slide notes: And then 'Retrieve Quote'.

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	Find Quote	_		
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	Find CRM Profile	Find Fin Acct	Quit / Give Up	
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Session Info: Terry is using IES	Application Wizard	Find A Quote	5 BGFRIEND-FINDQUO	TE 🚫 2010/01/26 10:53:26

Slide notes: We can now find any Quotation for this Customer from the CRM or Customer Account.

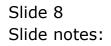
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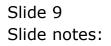


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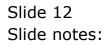
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Sales Code 01		Account				Club		Do Sale	Sale	
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wightenori		Available Credit		993,360.73		Directive			Warehouse Pre-Paid	
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1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00	
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82	
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		<u>Trade In</u> <u>Return</u>	Tax Status	may include tax	1	Direct Returns Trade-Ins	1,713.00 0.00 0.00 0.00 0.00	239.82 0.00 0.00 0.00 0.00 0.00	1,/952.82 0.00 0.00 0.00 0.00	
>>> Status		<u>Trade In</u> <u>Return</u>	Tax Status Operator	may include tax Terry	1	Direct Returns Trade-Ins	1,713.00 0.00 0.00 0.00	239.82 0.00 0.00 0.00	1,952.82 0.00 0.00 0.00	•
>>> Status		<u>Trade In</u> <u>Return</u>	Tax Status Operator Sys Ref #	may include tax Terry 1536738671A	1	Direct Returns Trade-Ins Specials	1,713.00 0.00 0.00 0.00 0.00	239.82 0.00 0.00 0.00 0.00 0.00	1,952.82 0.00 0.00 0.00 0.00 1,952.82 incl Total	
		<u>Trade In</u> <u>Return</u>	Tax Status Operator Sys Ref #	may include tax Terry 1536738671R LOCAL R	1	Direct Returns Trade-Ins Specials	1,713.00 0.00 0.00 0.00 0.00 1,713.00	239.82 0.00 0.00 0.00 0.00 239.82	1,952.82 0.00 0.00 0.00 0.00 1,952.82	

Slide notes: Once we have retrieved the Quotation, we choose FUNCTIONS again.

Sclient(Q) v8.2 Submit Quit Fun										
Submit Quit Fun	cions Comma	nas				1944	10-044-0			
?	<u> </u>		<b>(</b>	) «	»	10		_		<ul> <li>Ø</li> </ul>
		Cu	stomer	Sale, Ord	ler o	r Quotat	ion			
Find Cust?		News	GRABOWSKI	THERESA		CRM	00492	Do C	ale: -	Cashier
Sales Code 01		Account				Club		00 5	ale	Sale
Cust Ord# 0730	16/22	Account Balance		6,639.27		Expiry				Order
Origination 01 I		Credit Limit		1,000,000.00		Directive		Ň		Quotation
Origination		Available Credit		993,360.73		Directive			Wareh	ouse Pre-Paid
ex Catalog: -								Deal	Functions:	Functions
a catalog.		·						Deal	r uncuona.	
Stock Code	. Store	Description	Price	Cust Price Qty		Serial/Batch	Total	Tax	Order Funct	
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00	800 B	1,350.00		Quote Func Cashier - Pa	
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00		Directive Pe	
									Switch User	
									Lost Sale Re	porting
									Deal Views	
									Non-stock F Notes To Th	
									Drills To Tra	
									Crm Connec	
									Remove Cu:	stomer Link
									Tax Toggle	
									Cancel / Re Delivery	verse
		Direct				Catalog	1,713.00	1	Commission:	5
)irect (non Cata	log) : -	Trade In				Direct	0.00		Deal State F	unctions
		Return				Returns	0.00			eve / Create
>>> Status	Desc	ription 🔺		quote # 000008		Trade-Ins	0.00		My Deals	
1				may include ta	xable a	DI Specials	0.00		Local Functi Print Picking	
			Operator	Terry		Nett Total	1,713.00	1	THICHCONING	
			Sys Ref #	1536738671A			Excl Total		Tax	Incl Total
		<u> </u>		LOCAL R				1	Deposits	0.00
4		•	Rate Book	none					Due	1,952.82

# Slide 11 Slide notes: And 'Save / Retrieve / Create' again.

Submit Quit Functions	Comman	nds									
(?) C	<u>}</u>		v (	) «	»	ii i		_	6	<ul> <li>Image: A start of the start of</li></ul>	
		Cus	stomer	Sale, Ord	ier o	r Quotat	ion				
Find Cust?		Name	GRABOWSKI ,	THERESA		CRM	00492	Do S	ale: -	Cashier	
Sales Code 01			07306			Club		000	aror	Sale	
Cust Ord# 07306/22		Account Balance		6,639.27		Expiry				Order	
Origination 01 Main		Credit Limit		1,000,000.00		Directive		N N		Quotation	
ongination		Available Credit		993,360.73		Diroditto			Warel	house Pre-Paid	
ex Catalog: -								Deal	Functions:	Functions	e i
Stock Code	Store	Description	Price	Cust Price Qty		Serial/Batch	Total	Tax	Order Fund		
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00		Quote Fun Cashier - P		
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00			er Customer	
									Switch Use		
									Lost Sale R	eporting	
									Deal Views		
									Non-stock I		
									Notes To T Drills To Tra		
									Crm Conne		
										ustomer Link	
									Tax Toggle		
									Cancel / Re	everse	
		Direct				Catalog	1,713.00	2	Delivery		
)irect (non Catalog) :		Trade In				Direct	0.00		Commission Deal State		
neet (nen eatarog) .		Return				Returns	0.00			rieve / Create	d
>>> Status	Desci	ription	Deal Status	quote # 000008	4	Trade-Ins	0.00		My Deals		1
1	1			may include ta			0.00		Local Funct	tions	
			Operator			Nett Total	1,713.00	2	Print Pickin	g Slip	
			Svs Ref #	1536738671A		THOLE TOLON	Excl Total		Tax	Incl Total	
		-	Currency	LOCAL R			Exerretar	r	eposits	0.00	
		<u> </u>	Rate Book					0	opouro	1,952.82	



A IES Client(Q) v8.24 : My IES								
Help Submit Quit Functions Commands								
• (?) Q		) «	»				63 (Ø	×
	Customer	Sale, Ord	er ol	r Quotat	ion			
	sustomer	Sale, Old		Guotat				
Find Cust?	Name GRABOWSKI,	THERESA		CRM	00492	Do Sale: -	Cashier	
	count 07306			Club			Sale	
Cust Ord# 07306/22 Account E	alance	6,639.27		Expiry		>>	<u>Order</u>	
Origination 01 Main Store Cree	it Limit	1,000,000.00		Directive		~	<u>Quotation</u>	
Available	Credit	993,360.73					Warehouse Pre-Paid	
ex Catalog: -						Deal Functi	ons: <u>Functions</u>	
Stock Code Store Description 1 3008412 01 OLYMPUS CAMED	Price IA 1,350.00	Cust Price Qty 1,350.00	1.00	Serial/Batch	Total 1,350.00	Tax 189.00	Incl Value 1,539.00	-
2 3007058 01 NIKON COOLPIX		363.00	1.00		1,350.00	50.82	413.82	
2 3007030 01 MIKON COOLITA	41 303.00	303.00	1.00		505.00	30.02	413.02	
								-
Di	ect			Catalog	1,713.00	239,82	1,952.82	
Direct (non Catalog) : - V				Direct	0.00	0.00	0.00	
Rect (non catalog)				Returns	0.00	0 00	0 00	
>>> Status Description		quote # 0000084		Trade-Ins	0.00		ave And Clear Screen	
1		may include tax			0.00		onvert To New Deal	
		Terry		Nett Total	1,713.00	239.0Z	one Of These	
	Svs Ref #	1536738671A		THOLE FORM	Excl Total	Tax	Incl Total	
See	■ Currency	LOCAL R			27011010	Deposits	0.00	
E +	Rate Book					Due	1,952.82	

Slide notes: This time, the system senses that we have a Quotation on screen, and it offers a conversion option.

			v8.24 : I										
Help	Subr	nit Quit		ns Comma	nds								
	-	?		Q		<b>v</b> 0	) ((	<i>»</i>				49 Ø	×
					Cus	tomer	Sale, Ord		Quotat	ion			
					Cut	stomer	Sale, Old		Guotai				
		nd Cust?				GRABOWSKI,	THERESA		CRM	00492	Do Sale: -	<u>Cashier</u>	
			01 Indi		Account	07306			Club			Sale	
	C	ust Ord#	07306/2	22	Account Balance		6,639.27		Expiry		>>	Order	
	O	igination	01 Main	n Store	Credit Limit		1,000,000.00		Directive		~	Quotation	
					Available Credit		993,360.73					Warehouse Pre-Paid	
	ex C	atalog:	-		~						Deal Functi	ions: <u>Functions</u>	
		Stock			Description		Cust Price Qty		Serial/Batch		Tax	Incl Value	1
	1	3008		01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00 50.82	1,539.00 413.82	
	2	3007	058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82	
					Direct					1,713.00	239.82	1,952.82	
	D'		C		Trade In				Catalog	0.00	0.00	0.00	-
	Dire	ct (non	Catalog	):-	Return				Direct	0.00	0.00	0.00	-
		>>> 5	tatus	Deec	ription	Deal Status	new		Returns	0.00	0.00	0.00	-
	1	111 5	cacus	Desc	ripcion _		may include ta	vable an	Trade-Ins	0.00	0.00	0.00	-
						Tax Status Operator		and and the		1,713.00	239.82	1,952.82	
						Operator	1536738671A		Nett Total	Excl Total	Tax		1
Ses						Sys net #	LOCAL R			Exci Total	Deposits	0.00	
Ē	4				-	Rate Book					Deposits	1,952.82	-
	<u> </u>	1				rtate D00K					Due	-,	

Slide notes: The Quotation is then automatically converted into a New Order without any re-capturing being required.

		nt(Q) v8.24 : t Quit Functio		nde								
(				ilus .	v 0	) «	»				¢ 🗸	×
1												
				Cus	stomer	Sale, Ord	ler or	Quotat	ion			
	Find	I Cust?		Name	GRABOWSKI,	THERESA		CRM	00492	Do Sale: -	Cashier	
		s Code 01 Ind	ira	Account				Club			Sale	
		t Ord# 07306/		Account Balance		6,639.27		Expiry		<b>\$</b> 0	Order	
		ination 01 Mai		Credit Limit		1,000,000.00		Directive		X	Quotation	
			5	Available Credit		993,360.73					Warehouse Pre-Paid	
	ex Ca	talog: -								Deal Functi	ons. Functions	
	UN OU	and g.								Dearranea		ľ
		Stock Code	Store	Description	Price	Cust Price Qty	2	Serial/Batch	Total	Tax	Incl Value	
	1	3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00	
	2	3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82	
				Direct				Catalog	1,713.00	239.82	1,952.82	
	Direct	t (non Catalog		Trade In				Direct	0.00	0.00	0.00	
	Direct	(non Catalog	J) · ·	Return				Returns	0.00	0.00	0.00	
		>>> Status	Desc	ription	Deal Status	new		Trade-Ins	0.00	0.00	0.00	
	1					may include ta	xable an		0.00	0.00	0.00	
					Operator			Nett Total	1,713.00	239.82	1,952.82	
					Sue Raf #	1536738671A		NOLL TOLAL	Excl Total	Tax	Incl Total	
Ses					Ourrepou	LOCAL R			EXCITUTAL	Deposits	0.00	
F					Rate Book					Deposits	1,952.82	
100					TORC DOOK					Due		

Slide notes: And, in the case of an Indent Order, we can simply choose 'Warehouse Pre-Paid' to process it.

	ly IES								
Submit Quit Eunctions	Commands								
? (	2		v C	) «	»	- 17		(\$)	
		C		Sala Ord		Oundat	i e e		
		Cus	nomer	Sale, Ord	eror	Quotat	ion		
Find Cust?			GRABOWSKI,	THERESA		CRM	00492	Do Sale: -	<u>Cashier</u>
Sales Code 01 Indr		Account	07306			Club			Sale
Cust Ord# 07306/2		Account Balance		6,639.27		Expiry		>>	<u>Order</u>
Origination 01 Main	Store	Credit Limit		1,000,000.00		Directive		N	Quotation
		Available Credit		993,360.73				War	rehouse Pre-Paid
x Catalog: -	$\checkmark$							Deal Functions	Eunctions
Stock Code 1 3008412	Store Descri 01 OLYMP	ption PUS CAMEDIA		Cust Price Qty	s 1.00	erial/Batch			icl Value
1 3008412 2 3007058		OS CAMEDIA I COOLPIX 41	1,350.00 363.00	1,350.00 363.00	1.00		1,350.00 363.00	189.00 50.82	1,539.00 413.82
E	-	Direct				Catalog	1,713.00	239.82	1,952.82
irect (non Catalog)	🤝	<u>Direct</u> <u>Trade In</u>				Catalog Direct	1,713.00	239.82	1,952.82
irect (non Catalog)	:- <b>V</b>								
irect (non Catalog) >>> Status	:- Description	<u>Trade In</u> <u>Return</u>	Deal Status			Direct Returns Trade-Ins	0.00	0.00	0.00
		<u>Trade In</u> <u>Return</u>	Tax Status	may include ta	xable and	Direct Returns Trade-Ins	0.00	0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00
		<u>Trade In</u> <u>Return</u>	Tax Status Operator	may include ta Terry	xable and	Direct Returns Trade-Ins	0.00	0.00 0.00 0.00	0.00 0.00 0.00
		<u>Trade In</u> <u>Return</u>	Tax Status Operator Sys Ref #	may include tax Terry 1536738671A	xable and	Direct Returns Trade-Ins Specials	0.00	0.00 0.00 0.00 0.00	0.00 0.00 0.00 1,952.82 Incl Total
irect (non Catalog) >>> Status 1		<u>Trade In</u> <u>Return</u>	Tax Status Operator Sys Ref #	may include ta: Terry 1536738671A LOCAL R	xable am	Direct Returns Trade-Ins Specials	0.00 0.00 0.00 0.00 1,713.00	0.00 0.00 0.00 0.00 239.82	0.00 0.00 0.00 0.00 1,952.82

Slide 16 Slide notes: