

ORDERMASTER QUICK REFERENCE GUIDE

OM Major Functions

ADDING A FEW LINE ITEMS TO A SALES ORDER	OM32 Orders/Maint.	Edit/Import, Enter Line
ADDING COMMENTS TO A SALES ORDER	OM32 Orders/Maint.	When in order, Order Complete, type in up to 3 rows of comments about the total order. Commonly used comments can be created in Lists and selected here
ADDING NOTES TO A LINE ITEM	OM32 Orders/Maint.	When Entering a Line or when Modifying a Line, the Notes field on the lower part of the screen pertains to this product only
ADDING TO A SALES ORDER (IMPORTING MORE ITEMS FROM PDA)	OM32 Orders/Maint.	Check out second scanner, scan items, Palm Upload, Edit/Import (instead of New Order), select order, Import Lines
BACKING UP ORDERMASTER DATA	Database Tools	Backup and use default setting OR Browse out to external flash drive
CAPTURING CHARGE CARD INFO ON A SALES ORDER	OM32 Orders/Maint.	When in order, Order Complete and look for Payment for... Note this places the charge card info on one mfg/importer record only. You will see a copy button to replicate this to all mfgs in this buying event
CHANGE PRICE COLUMNS IN AN ORDER	OM32 Orders/Maint	When in an order, look in the Mfg Info section. Click Price Column Change button
CHANGING / MODIFYING A LINE ITEM ON A SALES ORDER	OM32 Orders/Maint.	When in order, click on the desired line item and Modify or double click the desired line item
CHANGING LOW BATTERIES IN A PDA HANDHELD WITH ORDER IN SCANNER	NEVER DO THIS!!!!	ALWAYS PROCESS THE ORDER AND THEN REPLACE BATTERIES! PLENTY OF POWER EXISTS FOR HOT SYNC
CHANGING SHIP DATES ON A SALES ORDER	OM32 Orders/Maint.	Order dates default to Ship As Soon As Possible. When in order, look at Mfg Info section for dates
CREATING A NEW CUSTOMER - BILLING	OM32 Orders/Maint.	From in a Sales Order - click on the NEW link on the upper left side of the billing box or from Find/Modify choose Add, check on Billing type. Note that you can add Billing customers from the Customer Maintenance function too - add contact info here if it should be kept from order to order
CREATING A NEW CUSTOMER - SHIPPING	OM32 Orders/Maint.	From in a Sales Order - click on the NEW link on the upper right side of the shipping box or from Find/Modify choose Add. Note that Shipping Customers can also be added in the Customer Maintenance function just like Billing Customers
CREATING A NEW SALES ORDER - MANUAL ENTRY	OM32 Orders/Maint.	Manual Entry, select sales rep, select bill/ship addresses, complete contact info (data typed here is saved for this order only), Enter Lines, review mfg shipping dates, Order Complete, set promos, enter in comments about entire order, select terms, select discount if any, then print. Save and Print Direct does not allow any changes. Save and Print allows change to number of copies, type form, physical printer and the ability to save as PDF or another print format
CREATING A NEW SALES ORDER - PDA HANDHELD DEVICE	OM32 Orders/Maint.	Palm Upload, Hit Hot Sync button on cradle, then New Order (when it turns green) - you do not have to wait on hot sync to
CREATING A NEW SALES ORDER - USB HAND SCANNER	OM32 Orders/Maint.	Begin with Manual Entry, complete as desired, Enter Lines, cursor automatically goes to barcode, scan using USB hand attached scanner, hit Enter, Enter, Enter. Scan the next item

START OM SWITCHBOARD TO SEE MAJOR PROGRAM FUNCTIONS

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DELETING / REMOVING LINE ITEMS	OM32 Orders/Maint.	When in order, click on the desired line item and click on Remove. Or right click mouse on Remove and you will be instructed <u>how to remove multiple lines</u>
DOWNLOADING FULL SET OF DATA INTO A PDA HANDHELD	Handheld Misc	Be sure that you perform OM Export for Palm for each product or price change. Then run OM Download to each palm
DUPLICATING A SALES ORDER - MERGE/COPY FUNCTION	OM32 Orders/Maint.	Merge/Copy button, select a "from" order in the upper half of the screen and then select New Order in the lower part of the screen. <u>Click Merge</u>
DUPLICATING A SALES ORDER - VIA HOT SYNC FROM SCANNER AGAIN	OM32 Orders/Maint.	Order stays in the scanner until the next time some one enters or scans in the rep id. Merely perform Hot Sync and New Order as many times as you need to duplicate the order
EDITING /MODIFYING A SALES ORDER SECTION	OM32 Orders/Maint.	Edit/Import, last order is on top (LIFO method). Click headings to sort by date or order number. Click Customer button to search by billing customer name
EMAILING ORDERS VIA MAPI COMPLIANT EMAIL	End Of Day	Print /Email Selected Orders button, select your orders, choose to email, fax or create pdf's from the selected orders. To use email your client must support MAPI requirements
ENTERING A CUSTOMER SPECIFIED PURCHASE ORDER #	OM32 Orders/Maint.	When in order, look in Mfg Info section and over write the system generated PO #
ENTERING A PRODUCT ON A SALES ORDER THAT NOT IN THE SYSTEM	OM32 Orders/Maint.	When in order, Enter line, select Mfg, click on Special Line Item. You may now write in any available field shown. Click Accept.
ENTERING NOTES INTO THE BODY OF THE SALES ORDER BETWEEN ITEMS	OM32 Orders/Maint.	Use "Entering A Product..." but omit price and quantity and you can "write a book" in the body of the order via the SPECIAL Line check mark
FLAGGING A LINE ITEM FOR "NO FURTHER DISCOUNTS"	OM32 Orders/Maint.	When in order, and working with a line, a click of the NFD button locks the price of this item from receiving any further discounts
GIVING A "NO CHARGE" TO A LINE ITEM OR PRICE OVERRIDE	OM32 Orders/Maint.	When in order, and working with a line, click on the price column dropdown arrow. Select "N" to give the product a No Charge or click on "S" and change the price. Or click on Special Line Item and override price
GIVING A DISCOUNT ON THE TOTAL ORDER	OM32 Orders/Maint.	When in order, Order Complete, and enter value into ADJ. field (discount field). Enter discount as 50.00 for 50 percent. Replicate to other orders in this buying event if necessary
GIVING A PRICE OVERRIDE ON A LINE ITEM	OM32 Orders/Maint.	When in order, and working with a line item, click on Special Line Item and alter the price or use the price column drop down and select "S"
LOADING MFG/IMPORTER/FACTORY DATA INTO ORDERMASTER	Import/Export	Arrange data into correct file or spreadsheet format (see layout specs under HELP/IMP/EXP folder). Select type of import and choose options. ALWAYS backup your system prior to importing data
LOADING ORDPAD PROGRAM INTO A PDA HANDHELD	Handheld Misc	OM Programs, select palm name from drop down, Install, hit Hot Sync button to start

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MAILING LABELS AND CUSTOMER LISTS	Import/Export	Export tab, the export Customer into Excel format. Follow Microsoft Mail/Merge instructions to create mailing labels or contact lists. Note you can export Product data into Excel to do price changes also - just choose Product instead of Customer
MAKING YOUR SYSTEM RUN FASTER	Database Tools	Periodically (once a month normal use or once a week extensive use) Reindex the databases. This compacts the data and gives additional processing speed
MERGE/COPY	OM32 Orders/Maint	Merge/Copy function can be used to merge 2 existing orders together or to copy an order by "merging" one existing order into a "new" order. The wizard will help you thru this function. The upper half of the screen pertains to the "coming from" order and the second half pertains to the "going to" order
MODIFYING A SALES ORDER	OM32 Orders/Maint.	Edit/Import and select the order to modify. Click headings to sort by order number or data. Click Customer button to search by billing customer
PRINTING BARCODE LABELS	Reports & Labels/WASP	Labels tab and Product Labels. Click on Printer if you use the generic label of 30 to a page straight out of OrderMaster and choose products in Selelection Criteria tab. If you use custom created labels, leave the button set to DBF file. Then you can either choose the products in Selection Criteria or export all and select them in WASP
PRINTING ORDERS BY BATCH (FOR SALES REPS)	End Of Day	Print Orders by Batch button, select the desired setting. Choose to either print hard copy or to pdf that can be emailed out
PRINTING REP LABELS	Reports & Labels	Labels tab and Rep Labels, print on 30 to a page label
PROCESSING SALES ORDER AT END OF DAY	End of Day	Process Order to select orders that have never been sent to the factory or select ReProcess Orders and choose the batch you desire to send again. Orders will be sent only ONE time no matter what in the Process Order function. Normally only ACCEPT orders will be processed. You may hold orders by choosing any other Order Status. When you take order off hold, the order date DOES NOT UPDATE. Thus you should always run with the first day of the show as your start date. Recommend that you use end of day as a cutoff and do not process more orders that day. Hold until next day or temporarily set computer date to tomorrow. Follow default setting shown in wizard
REMOVING A LINE ITEM ON A SALES ORDER	OM32 Orders/Maint.	When in an order click on the line to be deleted and click Remove or right click Remove and be instructed on how to remove multiple lines
REMOVING MULTIPLE LINE ITEMS ON A SALES ORDER	OM32 Orders/Maint.	When in a order right click on the Remove and you will see instructions. The line items are surrounded in a RED grid to help you see what is happening
RE-PRINTING A SALES ORDER	OM32 Orders/Maint.	Print button and then select the order similar to how it is done in Edit/Import above.

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REVIEWING A SALES ORDER DISCOUNTING POLICIES	OM32 Orders/Maint.	To Be Defined Based On Each Client's Requirements
RUNNING REPORTS	Reports & Labels	See document named Report Diagram and Description for detail of each available report
SAVING SCREEN SHOT PREVIEWS AS EXCEL OR PDF	All Functions	When a report or order goes to the screen, it can be saved as Excel or Adobe PDF. Look for a black "floppy" diskette symbol in the tool bar on the top. Click it to see the save options
UPDATING DATA IN A PDA HANDHELD	Handheld Misc	Palm Update export, then OM Download BUT click on UPDATE check mark before performing Hot Sync.
USING THE REGISTRATION SYSTEM TO ADD NEW ACCOUNTS	Reg. Syst & OM32 Orders & Maint	If you elect to use the badge scan for registration, new accounts can be added from the registration system. If the order process finds the company's phone number in the registration system you will be asked if you wish the name to be created in OrderMaster for order placement
GENERAL NOTES	Varied Functions	1-Never CANCEL an order but VOID it instead. The outcome is the same but VOIDED orders are saved should you wish to recover them. 2-No Further Discount (NFD) will keep this flagged product from receiving additional discounting in the order. 3-Contact info entered in during an order is "local" to this order only and is not saved for future use. 4-When asking for the customer's telephone number, always ask for the "billing" number or his show registration number rather than his cell phone number

Handhelds and Copy/Merge

Running multiple orders in the scanner at one time, i.e Valentine order and Christmas order or separate ship dates: merely scan the item and tap on Ship Dates as show on screen to right. Totals will be separated in the scanner. Then use Merge/Copy to break out the order in OM32. Use 12/25 for Christmas, 02/14 for Valentines, 12/31 for New Years, etc.

ProdNo HD6593
 UnitPrice ▾ 0 NFD □ \$5
 Min Order Ship Date 6
 Quantity Ordered 6
 (Note) (Inventory)

1	2	3	4
5	6	7	8
9	0	BP	ENT

Running Total

<input type="checkbox"/> Total Per Manufacture	WOOD \$ 36.....	STRT \$ 60.....
<input type="checkbox"/> Total Per Ship Date	RPP \$ 0.....	RCC \$ 0.....
<input type="checkbox"/> Total Per Prive Level	\$	\$
<input type="checkbox"/> Total For Multiple Order	\$	\$