

Split Schedules

• Released – SO Portal Split Schedule – July 2020

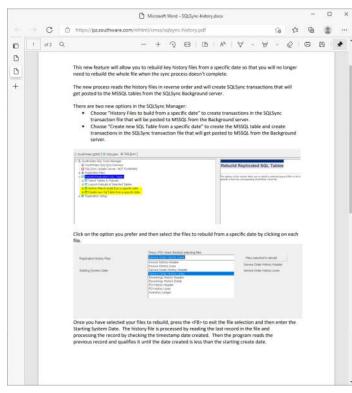
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Split Schedules, 2

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| | | Status:E | | | | | | |
| | | ity Health Care | Type:GEN Prob:PRT Terr:MI | | | | | |
| tact:Grady 5 | | | 1/09/19 13:50 Cover:REN Pri:0 | | | | | |
| Sched Start | | | 08:30 | Ł | | 1 | | |
| Responsible | | Joe | | | | | | |
| of Est Hrs | | 2.17 | | Total of Sc | heduled Hours | | 2.17 | |
| Assignments | | | | | | | | |
| Est hrs | 10.000 | Technician | Sched Date 10/21/21 | Sched Time | | | Description | |
| | 10e | | | | | | | |
| <u>.</u> | Joe | | 10/22/21 | 08.30 08.30 | 1 st trip 2nd trip | | | |
| 2: | | | | | | | | |

Hitting the split button brings you to this screen where, you can break up the imt

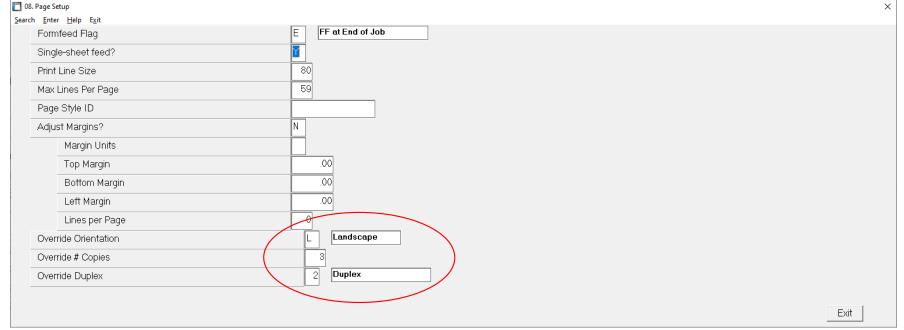
SQLSync – Rebuild from a specific date



Forms – 2 serial numbers/line

| Bill To: | 150 | 5 Victo | Auto Parts ory Boulevard GA 30050 | Ship To: | 404-528-4851 Columbus Aut 1505 Victory F Columbus GA | Boulevard Learn More 1 |
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| Invoice# Invoice Dt | | rder# rder E | Customer# Customer P.O.# | Te | rms | Salesperson |
| 57 11/30/19 | 78 | | 350 | Pr | x 2/5 Due 20 | UPS-Ground/Res 2 |
| Units | | U/M | Item Description | Disc | Unit Price | Amount |
| | 2 | EA | ****** DUPLICATE COPY ****** 305 Canon 3311 Personal Typewriter Serial Numbers: 262 263 | | 200.00 | 400.00 |
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New Printer Options – specify landscape or portrait, number of copies and duplexing in the printer record



Order Approval Portal

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| Orde | 1 | | Date | Amount | Oper | Order Type | Cust # | Name | Sis Loc # | Order Number: 198 | |
| | | ſ | | | | 2 | | · | | Location: 001 Type: R | |
| | 198 | | 10/24/19 | \$115. | 75 INV | R | 1 | Carl Sanders | BTR 001 | Order Date: 10/24/19 | |
| | 244 | ۹. : | 10/20/21 | \$9,980.0 | OO OE | R | 1 | Carl Sanders | BTR 001 | Ship Date: 00/00/00 Customer: 1 - Carl Sanders | |
| | | | | | | | | | | 123 Magnolia Avenue | |
| | | | | | | | | | | Auburn, AL 36830 | |
| | | | | | | | | | | Salesperson: BTR | |
| | | | | | | | | | | Total Price: 115.75 # Line Items: 2 | |
| | | | | | | | | | | Item Description | Qty |
| | | | | | | | | | | 100 747 Swingline Desk Stapler | 2.000 |
| | | | | | | | | | | 100-BLUE 747 Swingline Desk Stapler | 3.000 |
| | | | | | | | | | | | |
| | | - | | \$10,095.7 | 5 | | 1 | 3 | 15 31 | | |

Override standard grids

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| ader !!ems Payment/Totals | | | 2/31/19 \$ Open: 51,378.99 | | | a, 🗞 🗖 | |
| Order# 24 | Carl Sande | ers |] | | | | POS |
| Type Regular Order# Ln# Stock # Shipped | Description 1 | Decer | ption 2 | Description 3 | Qty Ordered | Unit Price | Extend Price |
| | line Desk Stapler | 7 1/4" long | piloti z | Description o | 1.000 | 19.96000 | 19 |
| | erlock Sport Shirt | 8oz 100% Cotton | BLUE/M | | 3.000 | 25.31800 | 75. |
| | erlock Sport Shirt | 8oz 100% Cotton | RED/M | | 10.000 | 25.31800 | |
| | erlock Sport Shirt | 8oz 100% Cotton | RED/S | | 5.000 | 25.31800 | 126 |
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Use variables as selection criteria

| RM-06 SouthWare Excellence Series (DM\) Demo Company | | | | | – 🗆 X |
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| * 2 🔍 🗖 🖦 🍓 🛛 | For Your Information (RM) | | | | |
| Category rs07 | 15 | MYSALES | v | | |
| ➢ Parameters ☐ GridView | | | | | |
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| Fields to Retrieve Order Number (*Alt) CONUMBER (*Alt) PO Number (*Alt) Order Entry Type (*Alt) Total Price (*Alt) Total Discount Salesperson Logon Salesperson Logon Salesperson | | Parameters (Add a range) (Add a range) (Add a selection rule) |) | | |
| Custom Layout Advanced Editing Qopy to Another Format Select DoWork IDs | | 1(Add a sort) | | | |
| | | | DEMO | 10/20/21 | 🥏 4 8701PR |
| Web Menu ReportMate Report Portal | | | | | |

Notes + XD for Inventory Adjust...

| IS-06-01-01 SouthWare Excellence Series (DM\) Demo Company | | | — 🗆 X |
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| | Enter / Edit Inventory Transactions | | |
| | 8 | | |
| *1. Transaction # 2. G/L Post Date 3. Date 4. Type 5. Stock Number 6. Location Transfer To Loc | 11 10/20/21 A Adjustment 100 001 N/A | 747 Swingline Desk Stapler | Oper INV EA |
| 7. Tracking Number 8. Job ID | N/A | | |
| Cost Code | N/A | LI/M EA | |
| 9. Quantity | 48.000 | | |
| 10. Cost | 10.950 MNT | Extended: 525.600 Management Adjustment | |
| 11. Reason Code 12. G/L Account # | 6140-000 | Repair and Maintenance | |
| 13. Reference | 0140-000 | | |
| 14. Storage ID | | | |
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| | | # to change | QK Qancel Notes 10/20/21 Notes |
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Inventory Ledger Entries now in Activity History

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| tory Manager 🥢 | Stock | Stock Details | | | | | | | |
| View | vs/Activity « | Stock Number 100 001 747 Swingline | Desk Stapler | | | | | | |
| in the second | | Activity List | | | | | | | |
| 747 St | wingline Desk Stapler | All Dates V 01/01/1900 thru 12/31/2099 Submit | | | | | | | |
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| | Open | Reference | Activity Type | Activity Date | Activity Time | Activity Source File | Qty | Extended Cost | Extended Price 5 |
| Go | History | | | | | | | | |
| d Guardh | Tracking records | Whs Trx #: 341 Source: Key: 22 | Whs Trx | 07/11/19 | | 1/69 | | 50.00 | \$0.00 |
| | | With 118 # : 348 Source: Key: 22 Svc Order #: 00100000074 Line #: 20 Type: Invent | Service Order | 09/18/19 | | SV06 | 1.0 | | |
| | and the second | Order #: 42 Line #: 10 Type: Inventory | Sales Order | 09/23/19 | | RS08 | 4.0 | | |
| Top Selling Items | All biotos | P/O #: 34 Line #: 40 Type: | Purchase Order | 09/30/19 | | IV26 | 5.0 | | |
| | Extended Data | Vendor Return #: 0000000011 Line #: 20 | Vendor Return | 10/24/19 | | RA02 | 1.0 | | |
| | Related Stock Info | Vendor Return #1 0000000011 Line #1 30 | Vendor Return | 10/24/19 | | RA02 | 1.0 | | |
| | | CFA # 000000010 Customer Return Authorization | Customer Return | 10/24/19 | | RA03 | 5.0 | | |
| Stock | | Order #: 197 Line #: 10 Type: Return | Credit Memo | 10/24/19 | | R508 | -5.0 | | |
| Vendor | | Order #: 198 Line #: 10 Tree: Inventory | Sales Order | 10/24/19 | | RS08 | 2.0 | | |
| Stock Tree Mgr | | Q-rate | Ledger - SALE | 11/25/19 | 195906 | 1715 | 1.0 | 10 \$10.95 | \$24.95 |
| 👢 Purchase Order Mgr 🧴 | 6 | Sales | Ledger - SALE | 11/26/19 | 154513 | | 1.0 | | |
| Receivings History | | C Receivings | Ledger - REC | 12/12/19 | 191908 | IV15 | 50.0 | 5997.50 | \$0.00 |
| Corder Fulfillment | 1 | P/0 #: 62 Line #: 10 Type: | Purchase Order | 02/01/20 | 9 | 1706 | 100.0 | \$10,950.00 | \$0.00 |
| Standard Reports | 3 | O Physical Adjustment | Ledger - PHYS | 02/10/20 | 151229 | IV15 | 826.0 | \$9,044.70 | \$0.00 |
| All Reports Maintain Files | 3 | P/O #: 70 Line #: 10 Type: | Purchase Order | 02/17/20 | 0 | 1/06 | 100.00 | \$10,950.00 | \$0.00 |
| New Task | | O Receivings | Ledger - REC | 02/17/20 | 102706 | 1V15 | 1000.00 | \$10,950.00 | \$0.00 |
| Operator Info | 3 | O Receivings | Ledger - REC | 02/17/20 | 112233 | 1V15 | 50.0 | 547.50 | \$0.00 |
| Help | 1 | Order #: 203 Line #: 20 Type: Return | Credit Memo | 02/21/20 | 0 | RS08 | -5.0 | 5-54.75 | 5-124.75 |
| | | < | | | | | 6745 | \$65,634.05 | \$23,712.58 |
| | _ | Total Records: 102 | | | | | 0740 | 300,634.00 | \$23,712.58 |

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Inventory Ledger Entries now in Activity History

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| QuickScreens Menu IS - Enter Order/Quote 📓 | nowledgement 🖌 Finish | | | | | | | | | | | |
| Sanders (1) | Order Date | | 10/19/21 | | | Tte | m Subi | total 🙂 | | | | \$1,367.76 |
| Magnolia Avenue | PO# | | 2 | | | | (es (1) | | | | | \$68.39 |
| urn, AL 36830 | Туре | | REGULAR | | | | ight | | | | | \$.00 |
| tact: Carl Sanders @ 334-821-2342 | Salesperson | | BTR-Blake Robbins | | | | ner Cha | arges | | | | \$.00 |
| dit Avail: \$.00 | Terms | | 2 (2/10 Net 30) | | | Par | ments | 5 | | | | \$.00 |
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Pricing Review Portal

| QuidScreens Menu 15 | | | | | | | | | | | | | | |
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| ustomer: Carl Sanders - Aubur | rn, AL | | | | | | | | | | | | | |
| stomer Number: 1 | Go Find Customer | | | | | | | | | | | | | |
| Cust/Item Pricing | Customer Price Overniles Cust 1 | vice Cl/R -Open Orders | Cust Pr | ice CVR -I | mates | | | | | | | | | |
| tem Selection | | C Price List for Carl Sa | mders | | | | | | | | | | | |
| | 1 - Carl Sanders | A 2 9 1 | | 0 | | | | | | | | | | |
| | 123 Magnolia Avenue Auburn, AL 36830 334-821-2342 | Stock Number | Loc | Cat | Description | Quote Qty | U/M | Unit Price | Price Source | List Price | List Discount | Ext Price | | |
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| | 5M | 100 100-6LUE | | 05 | 747 Swingline Desk Stepler | | 0 EA | \$9.960 | Stk / Cust | 24.95000 | 4,99 | | | 10 |
| | Al 💽 | 100-BLUE | | 05 | 747 Swingline Desk Stapler 747 Swingline Desk Stapler | | 0 EA | 21.95 | Stock (1) Stock (1) | 24.95000 | 3.00 | | | |
| tock No (blank for ALL) | | 101 | 001 | 05 | Swingline Half Size Stapler | | 0 EA | 6.50 | Stock (1) | 6.99000 | .49 | | | |
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| G | et Pricing | 105 | 002 | 011 | Panasonic Phone/Answering Sys | 1.00 | 0 EA | 200.00 | Stock (1) | 190.00000 | -10.00 | \$200.00 | | |
| | | 105 | 083 | OH | Panasonic Phone/Answering Sys | | 0 EA | 200.00 | Stock (1) | 190.00000 | -10.00 | | | |
| | | 196 | 001 | OM | Wiring Set-up for Phone System | 1.00 | 0 EA | 160.00 | Stock (1) | 180.00000 | 29.00 | \$160.00 | | |
| | | 200 | 001 | 05 | Plastikāps | 1.00 | 0 10s | 0.0045 | Stack (1) | .00450 | .00 | \$0.00 | | |
| | | 295 | 001 | OH | Canon PC-11 Personal Copier | 1.00 | C EA | 750.00 | Stock (1) | 995,00000 | 245.00 | \$750.00 | | |
| | | 205 | 002 | OH | Canon PC-11 Personal Copier | 1.00 | 0 EA | 750.00 | Stock (1) | 995.00000 | 245.00 | \$758.00 | | |
| | | 205 | 003 | OH | Canon PC-11 Personal Copier | 1.00 | O EA | 750.00 | Stock (1) | 995.00000 | 245.08 | \$756.00 | | |
| | | 2251. | 001 | AP | Ladies' Interlock Sport Shirt | 1.00 | 0 EA | 25.318 | Cat / Cust | 38.95000 | 13.63 | \$25.32 | | |
| | | 225L-BLK-L | 001 | AP | Ladies' Interlock Sport Shirt | 1.00 | 0 EA | 25.318 | Cat / Cust | 38,95000 | 13.63 | | | |
| | | 225L-BLK-H | 001 | AP | Ladies' Interlock Sport Shirt | | 0 EA | 25.318 | Cat / Cust | 38,95000 | 13.63 | | | |
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| | | 225L-BLUE-L | 001 | AP | Ladies' Interlock Sport Shirt | | 0 EA | 25.318 | Cat / Cust | 38.95000 | 13.63 | | | |
| | | 225L-BLUE-M | 100 | AP | Ladies' Interlock Sport Shirt | 1.00 | 0 EA | 25.318 | Cet / Cust | 38.95000 | 13.63 | \$25,32 | | ~ |
| | | Total Records: 344 | | | | | | | | | | | | |
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All price overrides for a customer can be tested in this portal, and where that price comes from can be seen.

Quote Review Portal

| | SouthWare Web Menu | | |
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| uddSoreers Menu 15 - Pricing Review 💽 TS - Sales Quote Review 🖸 | | | |
| ewling Quotes Order 236 H ew/Edit Quote PAdd a new Quote | | Occumentation | Courte Tels |
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| Criter # Date Item Total Salesperson Bill-to Name | Cust# #Lines Phone | | |
| | CUSE# PLINES PRONE | | Order Number: 236 Order Date: 10/20/20 |
| 234 00/25/24 \$124.75 AEM Continental LLC | 999999 1 | | Customer: Printed Meeple (# 999999) 123 Main |
| 234 00/25/24 \$124.75 AEM Continental LLC 236 10/25/20 \$374.25 AEM Printed Heeple | 999999 1 999999 1 | | San Antonio, TX 78232 |
| 240 05/12/21 \$0.00 BTR Manfred Homs | 2 4 205-749-5741 | | Salesperson: AEM Total Price: 374.25 |
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Locked Record Review

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| System Administrator | | | | | | | | Locked Record Info | | | | | | | , |
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| SouthWare DEND GERATOR Carlands Page | Int. • If a user ab - Not Selected • Not Selected | normully termin 1 | inates their log ected Record Key | | | ords no longer li WorkStation | aer exots a record the record to removed from the clead. You may purge these if desired. | File ID: Record Key: Date Locked: Time Locked: Workstation: Operator: | Name | /21 57 54 locked 5 DB Logon 10/ | MO OPER | ATOR. | 1 | | |
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Questions

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