ACCPAC CRM Order Entry for Sage CRM 6.1 + Version 4.0 Users Guide

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Who Should Read This Guide

This guide is for CRM Order Entry Users. We assume that you have experience using:

- Using Sage CRM 5.8+
- Using Sage Accpac ERP 5.5

How this guide is organized

You must read the “End-User License Agreement For CRM Systems Inc Software” in the pages that follow. Acceptance of this agreement is required in order install and use the software.

This guide is designed as a step-by-step manual allowing you to create, modify and complete (post) an order in CRMOE, using the various features and combination of features available.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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Section 1: CRMOE Outline

Product Outline

CRMOE Terminology

CRMOE – Our friendly (shorthand) term for CRM Order Entry for Sage CRM

AASOE – Our friendly (shorthand) term for the Order Entry module of Sage ACCPAC ERP (formerly ACCPAC Advantage Series)

Quote – This is different terminology from ACCPAC itself, in which there are 2 different "documents" in OE – a "Quote" and an "Order". CRMOE has no such distinction; all orders are quotes until such time as they are posted to ACCPAC Order Entry.

Post – Our term for sending a "Quote" to AASOE. This process is accomplished using the ACCPAC development environment.

Items – Our term differs from the ACCPAC term. While ACCPAC maintains a separate database of "Inventory Control Items (ICITEM)" and "OE Miscellaneous Charges (OEMISC)", CRMOE makes no such distinction. Items are items, regardless of their originating source in ACCPAC. We will refer to ITEM and MISC, but this is for backwards compatibility with ACCPAC terminology only.

CRMOE Features

The CRM Order Entry CRM Extension has many features, some of which are similar to functionality in ACCPAC itself, but many of which are unique to CRMOE. Below is a list of software functions and features:

CRMOE Exclusive Features

- 100% Browser based (non ACTIVE-X)
- Fast load / display times, no software or objects to install
- Customizable. Screens, fields, buttons can be adjusted.
- Workflow enabled – 100% driven by workflow. Extendable as desired.
- Maintain quotes with separate quote numbering.
- Look up inventory item status on current and alternate locations. Includes quantity on hand and “quantity available” – a real time calculation of actual unassigned inventory on hand. Can be done while entering an order or through the fast inventory finder.
- Available automatic ship all goods on an order.
- Automatic freight calculator, automates the process of calculating freight and adding to orders
- Predefined Discounts. Define “electronic coupons” or other predefined discounts on a dollar or percentage basis, and allow users to add them to orders based on security
- Item Kitting. Flexible, real-time customization of kits that can include stocking and non-stocking items, as well as miscellaneous charges. Customization based on security, and configurable by item within a kit.
- Available “Always use best price”, which uses the lowest price regardless of in force contracts
- View detailed item sales history by customer.
- Full integration to ACCPAC Order Entry
- Full integration to Sage ACCPAC CRM Library for filing of documents such as invoices, order confirmations, etc
- Email and print capabilities for documents direct from order entry
- Extensive order entry screen and workflow customization capabilities using standard CRMOE techniques and technologies
- Integrated Item and Miscellaneous Charge database takes the guesswork out of managing the item database
- Unlimited price discount levels, independently configurable by pricelist and currency.
- Integrated Electronic Credit Card processing using the E-xact payment gateway. Available integration to other gateways on request.
- Print standard quotes, order confirmations, invoices, picking slips, credit notes and shipping labels, or design your own forms and labels using the

built-in report writer. Generate and print document without using Crystal Reports or any other software.

Existing OE Features

- Extensive inquiry capabilities.
- Multicurrency support using the ACCPAC Multicurrency module.
- Integration with Inventory Control and Accounts Receivable modules.
- Unlimited comment and instruction specifications for each item on order.
- Enter active orders, future orders, standing orders and quotes.
- Print quotes, order confirmations, invoices and credit notes as you enter them, or print them all later.
- Print picking slips for selected orders.
- Print messages as long as 250 characters on order confirmations, picking slips and invoices.
- Commit a quantity to a specific order to ensure the quantity is guaranteed to be available for shipping.
- Extensive Inquiry Capabilities
- Keep complete transaction history.
- Review and reprint customer invoices and credit note transactions and orders.
- Specify whole or fractional quantities on orders, if fractional quantities are used in your inventory.
- Enter order quantities using any unit of measure defined in your inventory.
- Uses Accounts Receivable customer information, including price lists, customer types, tax groups and tax statuses, ship via, FOB point, primary ship-to and payment information.
- Simulates the contract pricing capabilities of Inventory Control by automatically using the contract price established for the customer.
- Simulates Tax Services to handle most tax computations and reporting. The exception is that tax-included pricing is not currently supported.

Differences between CRMOE and AAS OE

CRMOE is not a replacement for ACCPAC Order Entry (AASOE), and should not be considered as such. CRMOE is however a very useful compliment to AASOE in that with CRMOE it is possible to satisfy the requirements of the bulk number of OE users who require a user friendly, fast, efficient, customizable order entry solution. This can be done while allowing AASOE to perform the extensive functions it does well, in the backend by the accounting or order processing employee.

Pricing

CRMOE replicates closely the pricing functionality of ACCPAC Order Entry. Prices are determined based on customer, pricelist, contract, currency, and discount or markup on markup cost.

Differences are:

- In CRMOE, an item must be on the pricelist in order for it to be sold. Items not on the order’s selected pricelist will not appear as available for sale. This is different than in AAS, where the item will appear, but selecting it will generate an error. CRMOE always selects items available for sale from within the current pricelist, and within the current currency.
- CRMOE does not currently support Markup on Standard Cost.
- CRMOE supports “Always use lowest price”, whereby CRMOE will always calculate the lowest price available, even when a contract price is in force. For example, if a customer had an item on contract for $100, but the item went on sale in the customer’s pricelist for $95, CRMOE would calculate the price at $95, if this feature was turned on. This is different than AAS, where the contract price always holds.

Contract Pricing

CRMOE fully replicates the ACCPAC contract pricing capability. Contracts continue to be defined in AAS Inventory Control, as they would if using AASOE.

Differences are:

- CRMOE can be configured using the “Always use lowest price” option, whereby a contract would be ignored if the current selling price of the item on the pricelist (for example, by way of a “sale”) was lower.

Multicurrency

CRMOE fully supports multicurrency. Items configured in AAS in multiple currencies will be appropriately supported in CRMOE.

Differences are:

- In CRMOE, an item must be on the pricelist in order for it to be sold. Items not on the order’s selected pricelist will not appear as available for sale. This is different than in AAS, where the item will appear, but selecting it will generate an error. CRMOE always selects items available for sale from within the current pricelist, and within the current currency.
- CRMOE may not fully support currencies that use a decimal precision of more than 2 decimal places. If you have problems with this, please contact us.

Taxation

CRMOE simulates the AAS tax services calculator with some important differences:

Differences are:

- CRMOE currently does not support tax-included pricing
- CRMOE requires that tax authority and tax group information be configured for each item, by way of the item itself, or the item category. Any items that do not have a tax configuration on one (or both) of the item and or item category are automatically assumed to be NON-TAXABLE. This differs from AAS, where if tax information is not available, AAS will assume taxability is the same as the customer. CRMOE makes no similar assumption.
- CRMOE only supports tax rollup from detail to header. Taxes are calculates at the detail and summed for display at the header.
- CRMOE includes a “distribute header tax on posting” setting. Enabling this will apply tax to the order header in AAS, and then request AAS to distribute tax to the detail lines. Use of this feature should be reserved for special use, as doing so may result (in rare cases) in a different tax distribution in the AAS order than the CRMOE order.

Orders

CRMOE orders are simplified compared to AAS Orders. CRMOE orders lack, out of the box some of the capabilities of AAS orders, but have numerous features that the AAS order does not.

Many of the “Features not in CRMOE” can be supported through minor configuration/customization. CRMOE supports a novel “Interjection Point” solution whereby you can “interject” into the CRMOE process to add your own, custom logic. This provides almost limitless flexibility in areas such as field settings, pricing, button availability, error and status messages, custom logic, etc. These items are highlighted by “out of the box”.

Differences are:

Features not in CRMOE

- CRMOE is designed for order entry, not for order processing. In this regard, once an order is posted to AASOE, it is for all purposes “handed off”, and any additional changes must be handled in AAS itself.
- While you can “Ship All” and “Invoice All” in CRMOE, you cannot do partial invoices and partial shipments. Such functions are order processing issues, and would be handled in AASOE.
- Currently CRMOE supports 1 location per order—all detail lines will use the location specified on the order’s header.
- Out of the box - manual placement of order “on hold”. Is supported using customization API
- Detail line “discounts”
- Order header “discounts”
- 5.3 OE Optional Fields
- Out of the box - sales splits. By default only 1 salesperson is supported.
- AAS 5.3 “Kitting” CRMOE’s kitting is separately-configured

Features not in AASOE

- Fully configurable, customizable workflow
- Document routing, approvals, and generation (when configured)
- Integrated, electronic credit card processing
- Integrated, configurable prepayment processes such as: cash, check (cheque), debit (Interac), money order, manual process credit card, on account payment, etc.
- CRMOE’s kitting is separately-configured and permits the use of non-stock items and miscellaneous charges in a kit.

Document Generation

CRMOE is capable of generating documents such as Order Confirmations, Quotes, Invoices, Picking slips, etc. These documents are generated using its internal document generator, which is a generation engine based on HTML templates that are easy to create, customize and deploy.

The generation of documents in CRMOE is a handy method for generating documents at order placement time, for delivery to the end customer. This does not necessarily replace the generation of documents in AAS itself, but does decrease the number of such documents required.

Differences are:

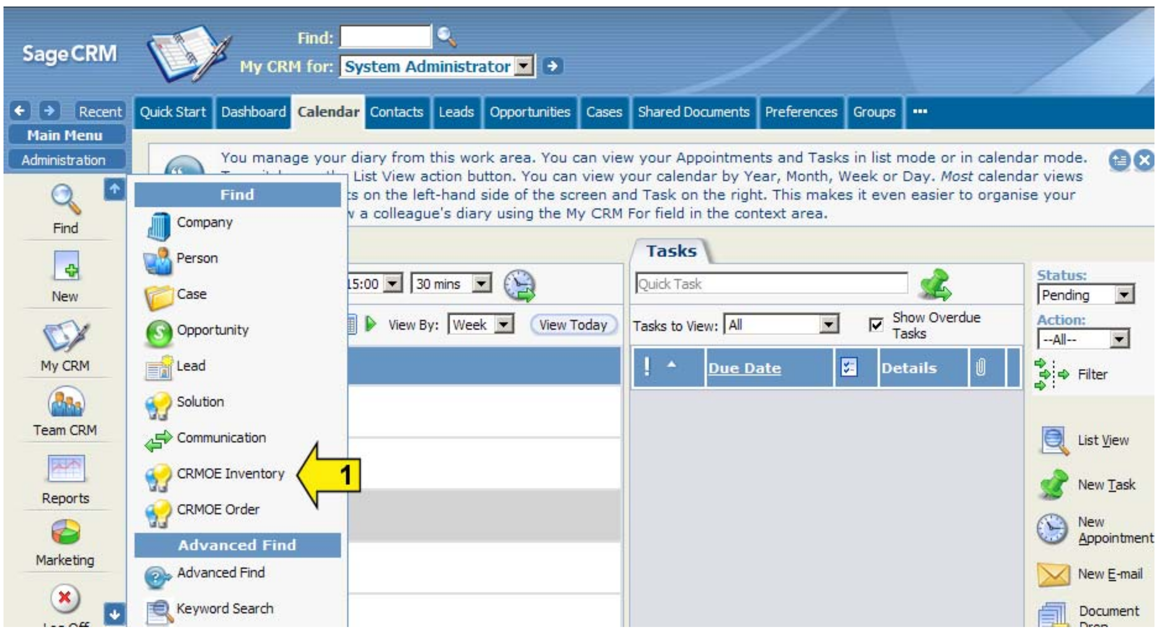
- CRMOE does not generate partial invoices. Partial invoices must be generated in AAS itself.

Section 2: Using CRMOE

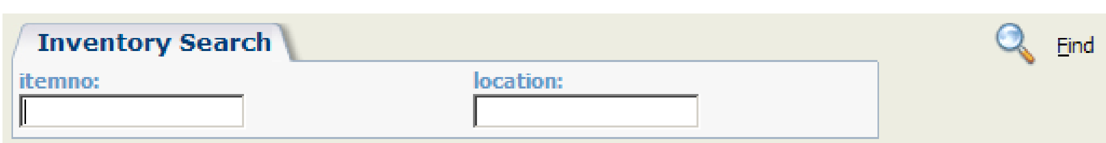
Finding Inventory

Installation of CRMOE includes the enabling of the “Inventory Finder”. The inventory finder is a very fast and easy way to find and review current inventory information from AAS in CRM. This is a useful tool for responding quickly to customer inquiries.

To launch the Inventory Finder, right click on “Find” and choose “CRMPE Inventory” (yellow arrow 1 below).

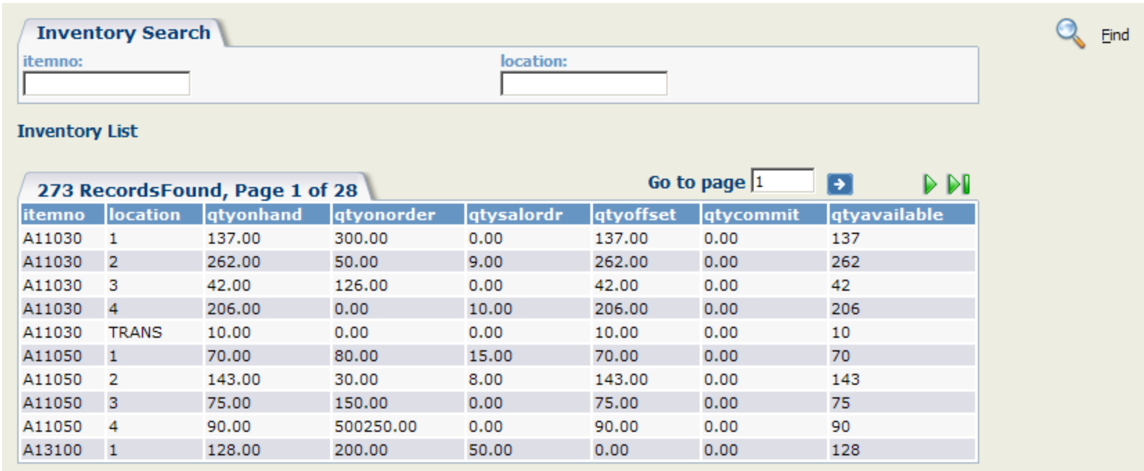


You will be presented with the inventory search screen



Enter your search criteria: Location, or Item Number (unformatted).

Here, a blank CRM search for items nets some results:



itemno	location	qtyonhand	qtyonorder	qtysalordr	qtyoffset	qtycommit	qtyavailable
A11030	1	137.00	300.00	0.00	137.00	0.00	137
A11030	2	262.00	50.00	9.00	262.00	0.00	262
A11030	3	42.00	126.00	0.00	42.00	0.00	42
A11030	4	206.00	0.00	10.00	206.00	0.00	206
A11030	TRANS	10.00	0.00	0.00	10.00	0.00	10
A11050	1	70.00	80.00	15.00	70.00	0.00	70
A11050	2	143.00	30.00	8.00	143.00	0.00	143
A11050	3	75.00	150.00	0.00	75.00	0.00	75
A11050	4	90.00	500250.00	0.00	90.00	0.00	90
A13100	1	128.00	200.00	50.00	0.00	0.00	128

You can see that the full item location, Quantity on Hand (AAS version) and Actual on Hand, CRMOE's real-time calculation of inventory including item sales, receipts and adjustments since the last day end.

Creating a Quote

Creating a CRMOE Quote is a multiple step process. The steps include:

- Create Quote Header
- Add Items, Charges and Discounts
- Convert to "Order"
- Process Payment (including on account)
- Post to ACCPAC Order Entry (AASOE)

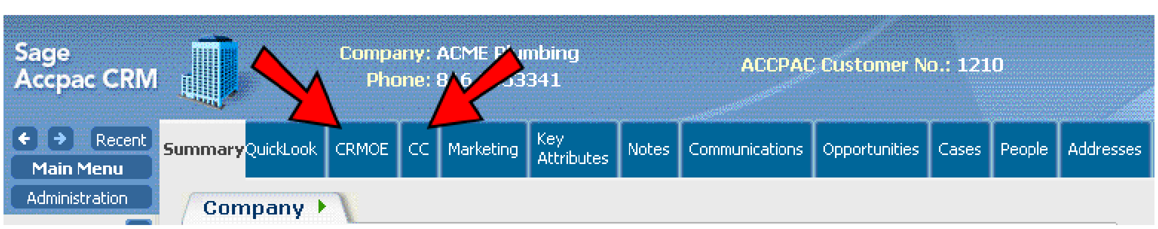
Note: By default, CRMOE 4.0 can use either short or long sales cycle. Short Order means that the process starts as a quote, and is then converted to order (ie, creates the related opportunity), which is then posted to ACCPAC. For environments where CRM is used in a longer sales-cycle environment, such as a software VAR or a car dealership, the process can be reversed so that the opportunity is created first, one or more quotes can be generated and issued, and ultimately one of them becomes the "order". For more information on implementing this reconfiguration, please contact your software provider.

Step 1: Locate your CRM Company

CRMOE is capable of generating quotes for both customers, and non-customers in CRM. When a quote is created for a non-customer, meaning the company status (Comp_Status) <> "Customer" and the company Customer # (Comp_Idcust), then CRMOE will use the default quoting customer number, which will have previously been configured by the system administrator. If this is a multicurrency system, there will be one Non-Customer Quoting Customer # for each currency, where the last 3 characters of the customer #s are the currency codes (ie, USD, CAD, JPY).

The following example assumes that the company is a customer, having previously been promoted to customer from CRM, or was imported from AAS.

The CRMOE and "CC" Tabs will now be present in the Company context tab bar.



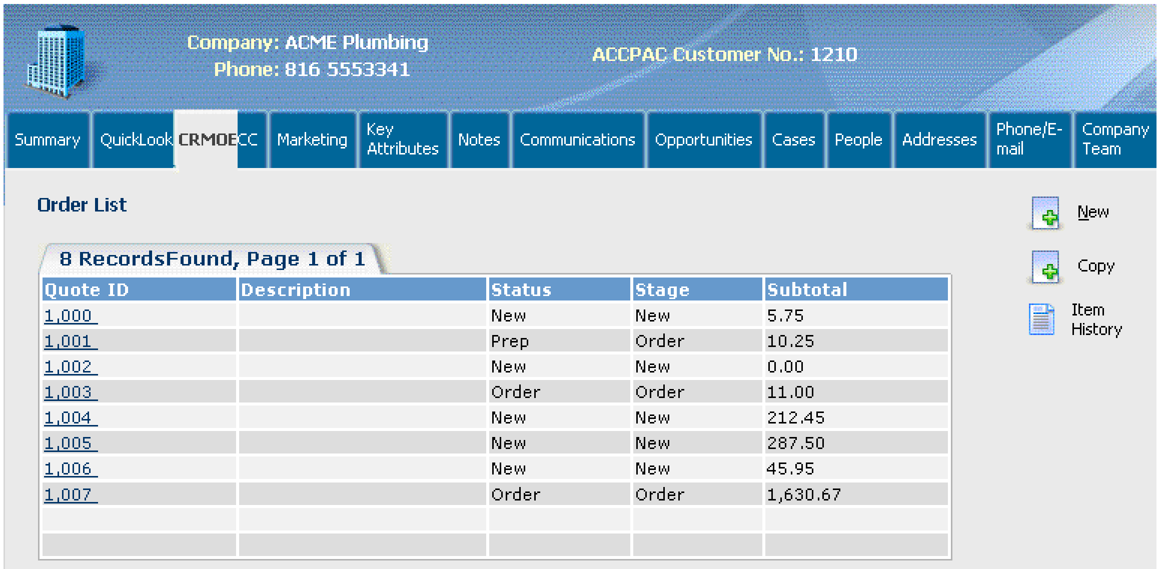
CRMOE: This tab contains a list of existing quotes, as well as the buttons required to launch a new quote, lookup item invoice history detail, and copy/duplicate quotes.

CC: This tab contains a list of on-file credit cards. Credit Cards are kept on file in CRMOE, in a secure 3 X 3DES encrypted format. This speeds order taking on future orders, and allows a closed-loop order cancellation / refund process when using the optional CRM Credit Notes module (CRMCN). Cards can be placed on file in one of 2 ways – by use of this tab, or inline during the order processing procedure. See the related sections for more information.

Note: Your CRMOE and CC tabs will not necessarily be located in the same relative position within the tab bar as those displayed here. If CRMOE has just been installed, these tabs will appear to the right hand end of the tab bar.

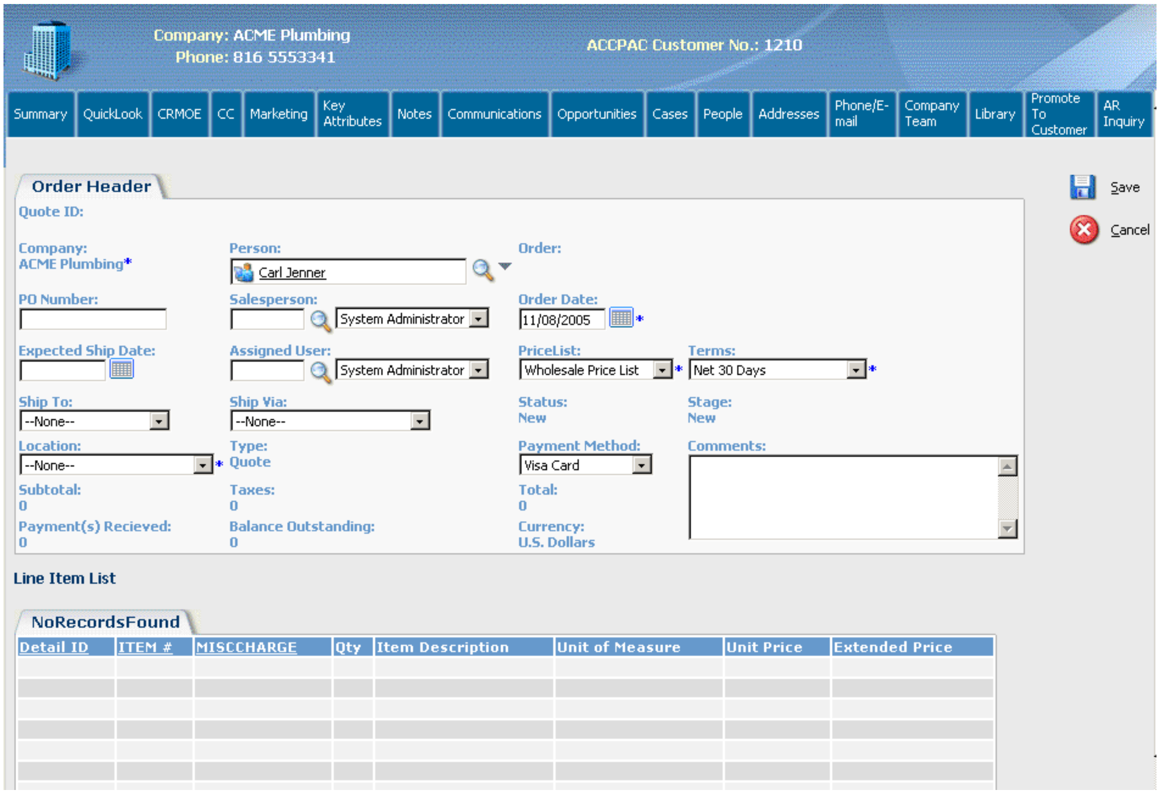
Step 2: Add a New Quote

Click on the CRMOE tab.



The quote list is displayed, showing all of the previously entered quotes / orders in the CRMOE system.

To create a new quote, click the “New” button in the button area on the right hand side of the screen. You will then see the new order header screen:



The CRMOE related fields on this screen is described below:

- Quote ID – Read Only. Once "Save" is clicked, will display the Quote ID, an important identifier for this document, which may ultimately become the order number, depending on your CRMOE configuration.
- Company – Read Only. Should be equivalent to the current company in context.
- Person – Will default to the company's default person. Can be changed to any person within the current company, as defined by the company field on this same screen.
- Order – Once this quote is converted to order, the opportunity related will appear here.
- PO Number – Enter a PO number here if appropriate.
- Salesperson – Select a user in CRM who is the appropriate salesperson for this order. The default will be set based on CRMOE's configuration and may not be you.
- Order Date – The date of the order. Will default to today's date.
- Expected Ship Date – If you have a date of expected shipment, enter it here. It will appear on documents containing this merge field.
- Assigned User – The user currently assigned to this order. This is a CRM only field and has no impact on the order ultimately entered into AAS. Can be used for notifications, workflow routing, etc. Out of the box, this field serves no purpose in CRMOE.

- Pricelist – The pricelist to use for this order. Will default to the customer's default pricelist as configured in AAS AR, unless the current user's CRM user account has been configured with a pricelist override.
- Terms – The terms for this order. Will default to the customer's default terms code as configured in AAS AR.
- Ship To – The customer's ShipTo from AAS AR. Select if appropriate. This will determine two things:
    - The ship to details on the order
    - The taxation classes used for the customer when calculating tax. This means taxes will be calculated based on the tax configuration of the Ship To, and not the bill to. This is consistent with AASOE. However, remember that CRMOE makes no assumptions about taxability, and if taxation details are not set on the ShipTo, then no taxes will be charged.
- Ship Via – The method used for shipping. Normally this is populated with various carriers (postal service, courier company, pick up, etc). This field has an important impact on the order depending on CRMOE's configuration. Specifically, if you are using the Auto-Freight features of CRMOE, where freight is automatically added to an order, then this field determines which carrier will be referenced in the shipping lookup matrix.
- Status – Read only – tells you the current status of the document. Should ready "Quote", "Prepared for order submission" or "Order". This field is managed by CRMOE and cannot be modified, removed or hidden.
- Stage – Read Only – tells you the current stage of the order. Should be "Quote" or "Order". This field is managed by CRMOE and cannot be modified, removed or hidden.
- Location – The location to ship this order from in AAS IC
- Type – The current document type. "Quote" or "Order". May also be "Invoice" if the optional CRMOE/AASOE synchronization is enabled. This field is managed by CRMOE and cannot be modified, removed or hidden.
- Payment Method – The method the customer will use to pay for this order. Analogous to the "Receipt Type" in AASOE. Payment Methods must be configured in CRMOE by the administrator prior to use. Their existence in this list does not imply they have been configured.
- Subtotal - Read Only. The subtotal of the items on the order.
- Taxes – Read Only. The total of the taxes calculated on the order. By default this is the only tax field displayed on the CRMOE Header screen. Other fields (ie, tax names and amounts) are available for addition to the screen via customization. Used for display purposes only.
- Total – Read Only. The subtotal, plus taxes. Used for display purposes only.
- Payment Received – Read Only. The total of all prepayments entered against this order. Used for display purposes only.
- Balance Outstanding – Read Only. The order total less the payments received. Used for display purposes only.
- Currency – Read Only. The currency in use on this order.

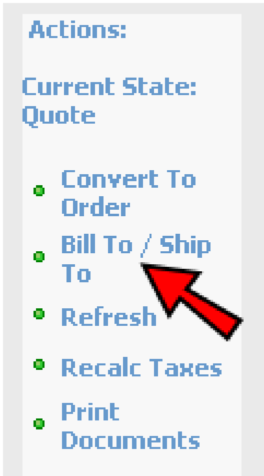
- Comments – Enter any order comments here.

To complete the order header creation process, fill in any appropriate fields and click "Save".

You have completed the creation of the quote.

Remember: CRMOE refers to this document as a quote. In AASOE, it could be a "Quote" or "Order" depending on how it is created. The document in CRMOE will only become an "Order" once converted to one.

Editing Bill To and Ship To Information

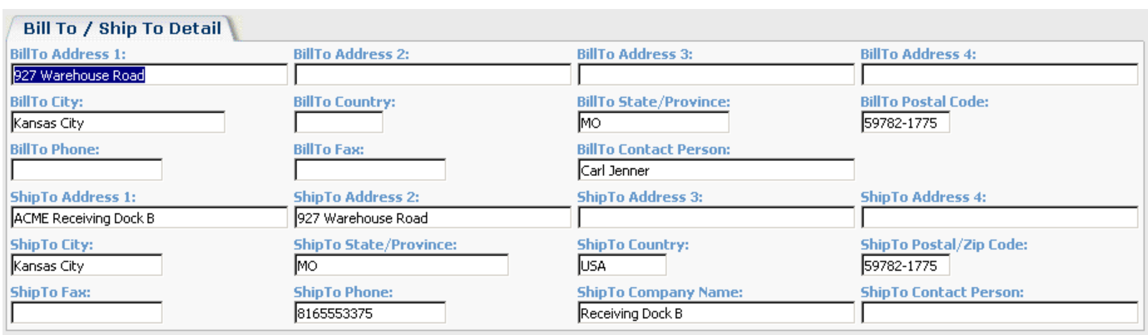


To edit the bill to and or ship to information on this quote requires use of the “Bill To / Ship To” workflow option.

You might modify Bill To or Ship To information if, for example the order needed to be shipped to an address that was not currently on file in AAS AR as a Ship To. CRM currently has no method to add ship tos to AAS, which means this can be an issue.

If the ability to add Ship To addresses to AAS is required, CRM Systems provides our CRM Ship To Integration of ACCPAC Advantage Series. This extension product allows for definition and ongoing synchronization of ship tos within CRM.

Clicking the Bill To / Ship To workflow option gives you the editing screen:



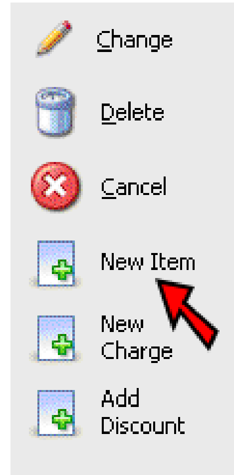
You can modify any and all of these values as appropriate. Click “Save” when you are done.

Click the Continue button to return to the quote header screen

Your edited address information will be posted to AAS and will appear on any documents generated for this order. The changes will not update the related addresses in CRM or AAS on a permanent basis.

Note: The “Recalc Taxes” button is necessary in situations where the AutoTax Calculation option in CRM OE Configuration is turned off This option is normally chosen when the highest speed of processing is desireable.

Adding / Editing Normal Items

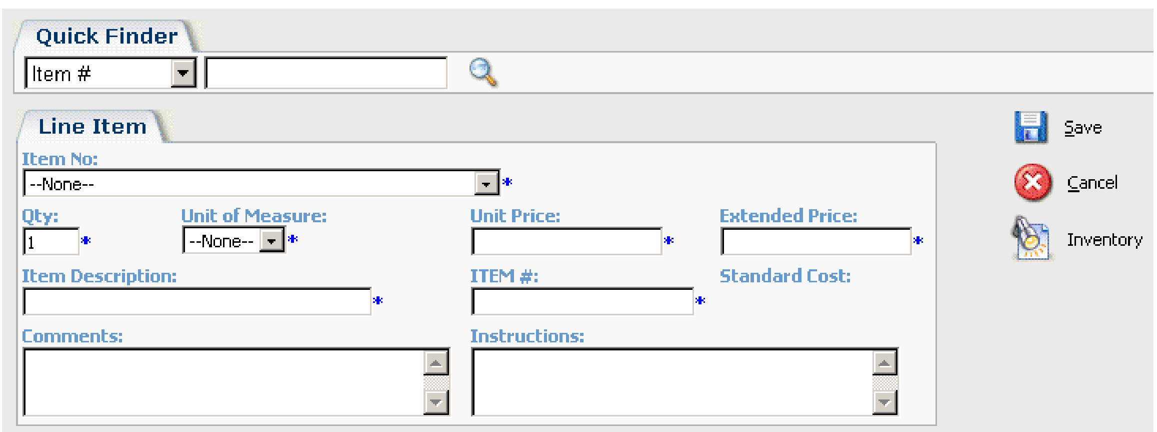


An order gains substance by adding the items the customer is interested in purchasing. Adding items to a CRMOE order is fast and easy. To add an item, click on the “New Item” button.

Note: The availability of the New Item button is dependent on the “Status” the document is currently in. Only “Quote” and “Prepared for Order Submission” states will allow addition of an item. Once an order is posted to AAS, and becomes an “Order”, it can no longer be edited or added to in CRMOE.

Clicking the New Item button will pop-up the Line Item Entry window.

Note: This means that your web browser must allow pop-ups for the web site URL that CRMOE is running under.



The Line Item Entry window is broken into 2 parts:

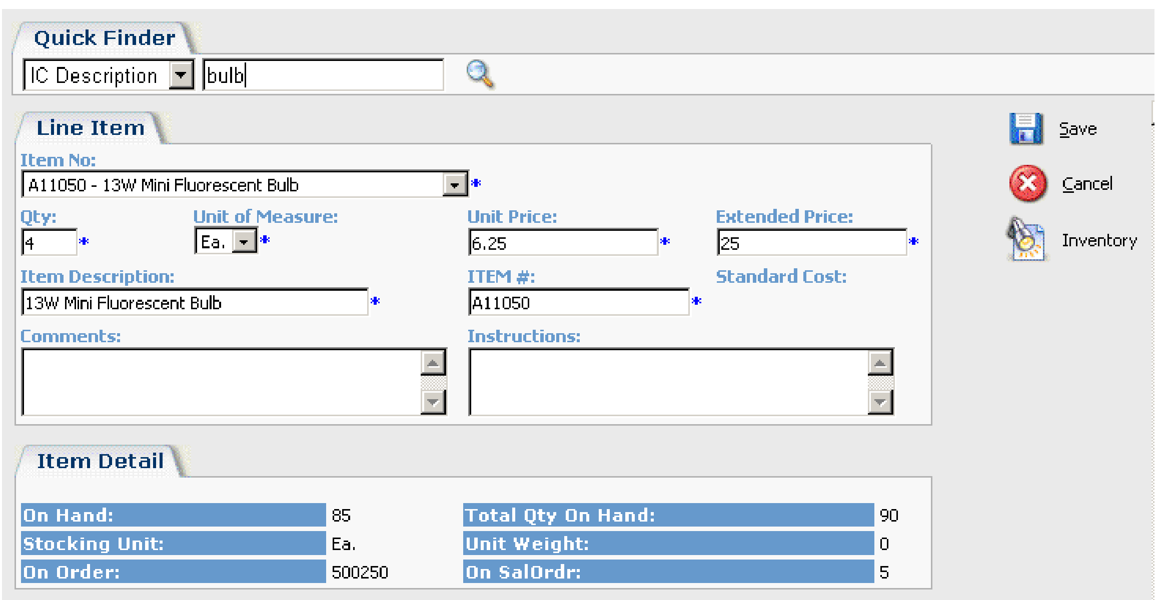
- Quick Finder – The “finder” for CRMOE items. Search by Item #, IC Description, Pricelist Description, or all fields. The matching items will be loaded into the “Item No” field in the Line Item Entry pane. Clicking the finder icon, or clicking “Enter” will cause the search to be executed.
- Line Item Entry – This pane is used to actually add the item to the quote.

The CRMOE related fields on the Line Item Entry pane are described below:

- Item No – The CRMOE Item selector. Select the appropriate item in the resulting list from your search
- Qty – The quantity of the item to purchase
- Unit of Measure – The unit of measure to use
- Unit Price – The per unit price of the item

- Extended Price – Read Only – The extended price (Qty * Unit Price)
- Item Description – The description of the item. This will be populated automatically in the following order, and can be overridden:
  - o The “pricelist description” if it exists, if not then
  - o The “inventory control description”
- Item # - Read Only - The AAS IC Item Number.
- Standard Cost – Whether this field is available for editing depends on several factors. If available for editing, the user can specify the cost to use for this item:
  - o Is the item Non-Stock
  - o Is the item configured to be costed by CRMOE
  - o Is the user enabled for editing of costs
- Comments – Add any comments
- Instructions – Add any instructions

Search and find your item, and select the remaining options. For example, here we have searched for all “bulb”, by IC Description, chosen one, and will be ordering 4 of them.



Note: If you change the Item No, Qty or Unit of Measure, the Unit Price, Extended Price, and Item Description will be automatically recalculated. If you have, therefore, edited the Item Description then change the Item or Quantity, your changes will be overwritten by the system description. Therefore, you should leave editing the item description as the last field you modify prior to clicking “Save”.

Note: After you select the item, the “Item Details” will be populated. The inventory information here is for the current order location. If you wish to see inventory for this item in alternate locations, you should click the "Inventory" button. Doing so will pop up the alternate inventory window:

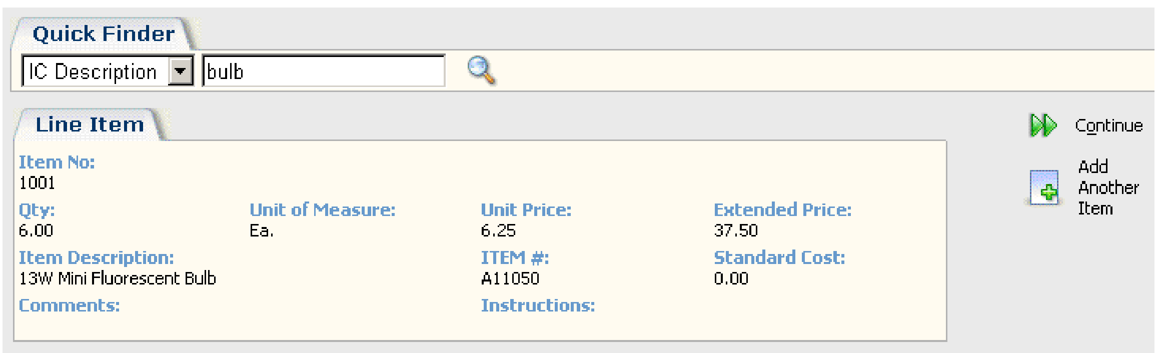
Inventory Lookup for Item: 13W Mini Fluorescent Bulb

Item	Location	QOH	QAV
A11050	Central warehouse - Seattle	70	55
A11050	Portland Office	143	135
A11050	Newark, New Jersey	75	75
A11050	Port of San Fancisco	90	85

Close

Click close to return to the Line Item Entry window.

Click "Save" to save this line item.



You then have the option to:

- Continue – Will minimize this window, refresh the quote document, and return you to your quote for further processing.
- Add Another Item – Will return to the Line Item Entry window.

Note: Occasionally the Quote itself will not refresh, and you will not see your item on the quote. If this happens, click the "Refresh" workflow option, and the item will appear.

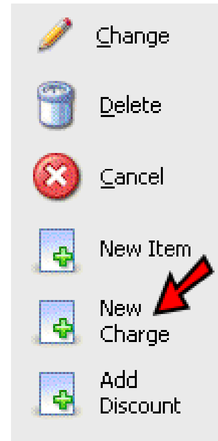
Note: The New Line Item Entry window does not "Close" when you are done with it. It minimizes itself and remains on the toolbar. This is to speed up subsequent new item additions, as the web browser does not need to re-open the window. This can shave 5-20 seconds off adding each line item, depending on the speed of your local computer.

You have successfully added an item to your quote.

Adding / Editing Charges

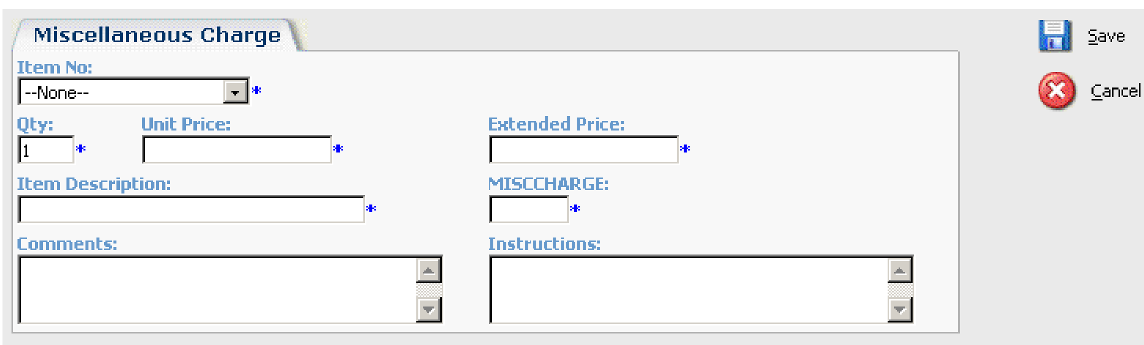
An order gains substance by adding the charges appropriate to this order and customer. Adding charges to a CRMOE order is fast and easy. To add an item, click on the “New Charge” button. This is analogous to adding a “Miscellaneous Charge” in AASOE

Note: The availability of the New Charge button is dependent on the “Status” the document is currently in. Only “Quote” and “Prepared for Order Submission” states will allow addition of an item. Once an order is posted to AAS, and becomes an “Order”, it can no longer be edited or added to in CRMOE.



Clicking on the New Charge button will pop-up the Line Charge Entry window.

Note: This means that your web browser must allow pop-ups for the web site URL that CRMOE is running under.

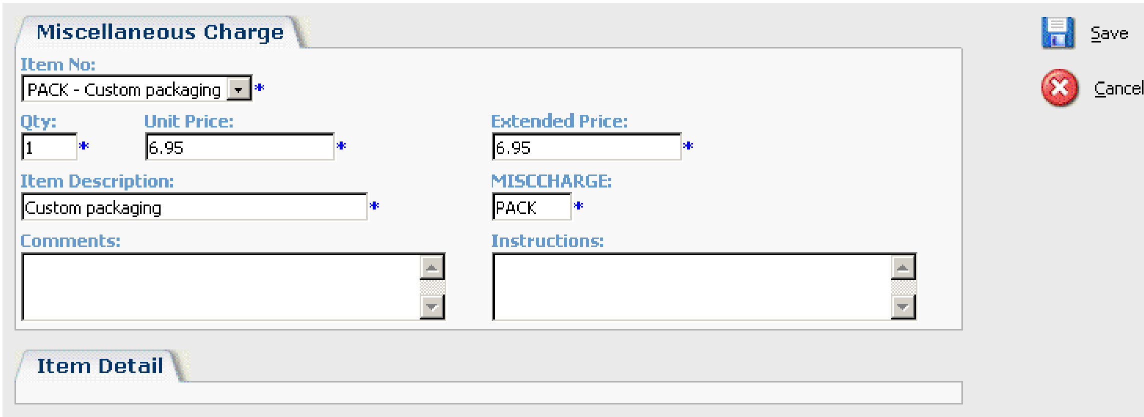


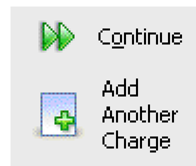
The Line Charge Entry screen is less complex than the Line Item Entry Screen. There is no “Quick Finder”, simply a select list where the appropriate charge is selected.

The CRMOE related fields on the Line Charge Entry pane are described below:

- Item No – The CRMOE Item selector. Select the appropriate charge item in the list
- Qty – Read Only – Will default and always remain as 1. This field cannot be removed from this screen.
- Unit Price – The per unit price of the item
- Extended Price – Read Only – The extended price (Qty * Unit Price)
    - Item Description – The description of the item. This will be populated automatically from the miscellaneous charge configuration in AASOE. It is override able.
- MISCCHARGE - Read Only - The AAS OE MISCCHARGE Code

Select the appropriate charge, and fill in the appropriate details. In this case, we will be charging this customer $6.95 for packaging.





Click “Save” to save the item onto the order.

You then have the option to:

- Continue – Will minimize this window, refresh the quote document, and return you to your quote for further processing.
- Add Another Charge – Will return to the Line Charge Entry window.

Note: Occasionally the Quote itself will not refresh, and you will not see your charge on the quote. If this happens, click the “Refresh” workflow option, and the item will appear.

Note: The New Line Item Entry window does not “Close” when you are done with it. It minimizes itself and remains on the toolbar. This is to speed up subsequent new item additions, as the web browser does not need to re-open the window. This can shave 5-20 seconds off adding each line item, depending on the speed of your local computer.

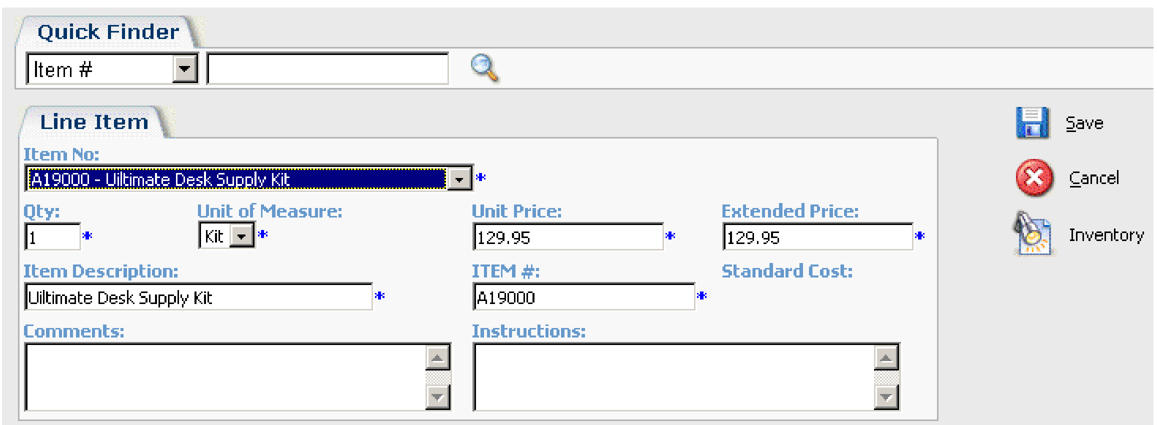
You have successfully added a charge to your quote.

Adding Kits

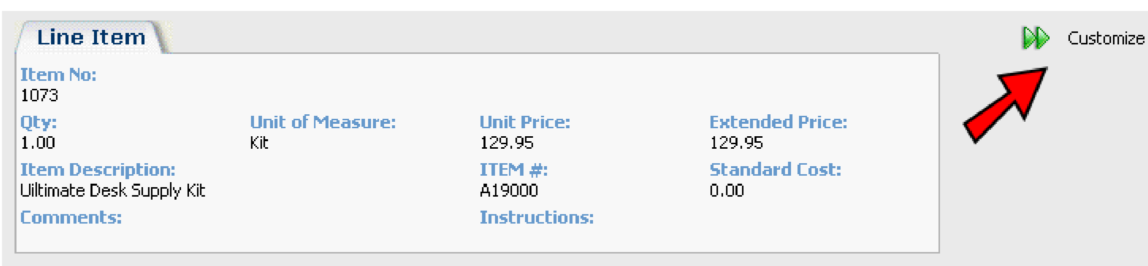
CRMOE Kitting is a flexible kitting solution that has the following benefits:

- Easily setup and maintained
- Kits are customizable "on the fly" during the processing of an order
- Kit customization is enabled or disabled via security
- Kits can contain both stock and nonstock items, as well as miscellaneous charges.
- Kits can be priced based on the "Kit Price" or on the "Component Total"
- They are easy to use!

If your system administrator has already configured kits for you, using them is simple. Follow the same process outlined in "Adding / Editing Normal Items" to find an item in the Line Item Entry window. However, this time, select a unit of measure that has been configured as a kit:



At first, Kits don't appear any differently than normal items. The differences occur when you click "Save"



Instead of a "Continue" button, you will see a "Customize" button. This will begin the "Kit Customizer", which will allow you to tailor the kit, depending on your security settings.

Priced by Kit

If your kit was configured to be priced by "Kit Price" then your screen may look something like this:

Kit Components Add New Continue

Description: The Ultimate Desk Supply Kit

Item	Desc	QAV	Qty	UOM	UPrice	Ext Price
A11030	Fluorescent Desk Lamp	0	1	Ea.		
A11050	13W Mini Fluorescent Bulb	0	1	Ea.		
A14000	Desk Note Book	0	1	Ea.		
A14500	Bulletin Board	0	2	Ea.		
A18000	Wastebasket	0	1	Ea.		
A16550	Pen	0	1	Ea.		

Kit Combined Price 129.95

The kit in this example is priced based on a kit price. This means that the items within the kit do not have a specific price associated to them, until the kit is broken into its component parts.

You can, however modify the components of the kit based on the kit configuration. In this example, the "wastebasket" has been configured not to be editable, while the other line items have been.

Items in a kit can be configured to "Factor" or not. This means that if, for example we ordered 2 kits, if the "Bulletin Board" item was configured to factor, the quantity would appear here as "4" (2 x 2). If the "Bulletin Board" was not configured to factor its quantity would remain at its fixed amount, 2.

Adjust your quantities as appropriate. To remove an item from those included in the kit, set its quantity to 0.

In this mode, you must also manually adjust the price to be charged for the kit. If you add an extra item, you may want to edit the "Kit combined price" to reflect the change.

Click "Continue". Your kit will then be broken down into its component parts, and added to your order.

In this mode, the individual items will be priced based on their relative value within the kit. This is determined based on the extended price (what CRMOE would have calculated the price to be) of that line item divided by the combined price. This is the weighted average. This is then multiplied by the kit combined price to get the extended amount to apply to that line item. The extended price is then divided by the quantity to come to the unit price.

Priced by Component Total

If your kit was configured to be priced by "Kit Price" then your screen may look something like this:

Kit Components — Add New — Continue

Description: The Ultimate Desk Supply Kit

Item	Desc	QAV	Qty	UOM	UPrice	Ext Price
A11030	Fluorescent Desk Lamp	0	1	Ea.	13.56	
A11050	13W Mini Fluorescent Bulb	0	1	Ea.	7.1	
A14000	Desk Note Book	0	1	Ea.	24.95	
A14500	Bulletin Board	0	2	Ea.	17.7	
A18000	Wastebasket	0	1	Ea.	4.18	
A16550	Pen	0	1	Ea.	1.2	

In this case, the total price of the kit is made up of its component parts, as configured by the Kit Customizer.

This can be a bit confusing at first, because when the item is selected in the Line Item Entry window, a price is displayed – in this case, $129.95. However, that price is simply an estimate, the actual price will depend on what is added and removed from the kit here.

You can edit the Quantity and Unit Price depending on your security. You can see the Wastebasket is still not editable, and this is due to its configuration in the kit.

To eliminate an item from the kit, edit its quantity to zero (0).

Edit the quantity and unit prices accordingly. Click "continue" when you are finished.

The kit will be broken into its component parts, and the quantities and prices will be added to the order as you specified.

Your order should now look something like this:

Order Header

Quote ID:
1,008

Company: ACME Plumbing
Person: Carl Jenner
Order:

PO Number: POABC029
Salesperson: System Administrator
Order Date: 11/08/2005

Expected Ship Date:
Assigned User: System Administrator
PriceList: Wholesale Price List
Terms: Net 30 Days

Ship To: B
Ship Via: Express Parcel Service
Status: Prep
Stage: Order

Location: Port of San Fancisco
Type: Order
Payment Method: Cash
Comments: My comments

Subtotal: 160.79
Taxes: 13.25
Total: 174.04

Payment(s) Recieved: 0.00
Balance Outstanding: 174.04
Currency: U.S. Dollars

Line Item List

9 RecordsFound, Page 1 of 1

Detail ID	ITEM #	MISCCHARGE	Qty	Item Description	Unit of Measure	Unit Price	Extended Price
1,033	A16550		1.00	Pen	Ea.	1.20	1.20
1,032	A18000		1.00	Wastebasket	Ea.	4.18	4.18
1,031	A14500		2.00	Bulletin Board	Ea.	17.70	35.40
1,030	A14000		1.00	Desk Note Book	Ea.	24.95	24.95
1,029	A11050		1.00	13W Mini Fluorescent Bulb	Ea.	7.10	7.10
1,028	A11030		1.00	Fluorescent Desk Lamp	Ea.	13.56	13.56
1,025		PACK	1.00	Custom packaging		6.95	6.95
1,024		TF	1.00	Taxable freight		29.95	29.95
1,023	A11050		6.00	13W Mini Fluorescent Bulb	Ea.	6.25	37.50

Here we see the Pen, Wastebasket, bulletin board, desk note book, 13W Mini Fluorescent Bulb, and Fluorescent desk lamp that were included in our kit, added to the order.

The “Custom Packaging” we added in the “Adding / Editing Charges” section, and the “13W Mini Fluorescent Bulb” on line 1023 we added in the “Adding / Editing Normal Items” section.

The “Taxable Freight” on line 1025 was added automatically by the shipping calculator in CRMOE. This will be discussed later.

You have successfully added and customized a kit on your order.

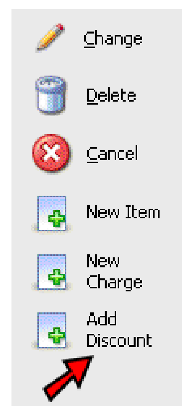
Adding Discounts

CRMOE discounts are essentially predefined charges (although they can be items as well) that are either fixed dollar amounts, or amounts calculated based on one of two methods:

- Last Item – The discountable amount of the last line item on a quote. This will either be the extended amount of the line, or 0, if the item has not been configured such that it is “Line Discountable”.
- Discountable Subtotal – The subtotal of all lines on the quote, at this time, that have been configured as “Line Discountable”.

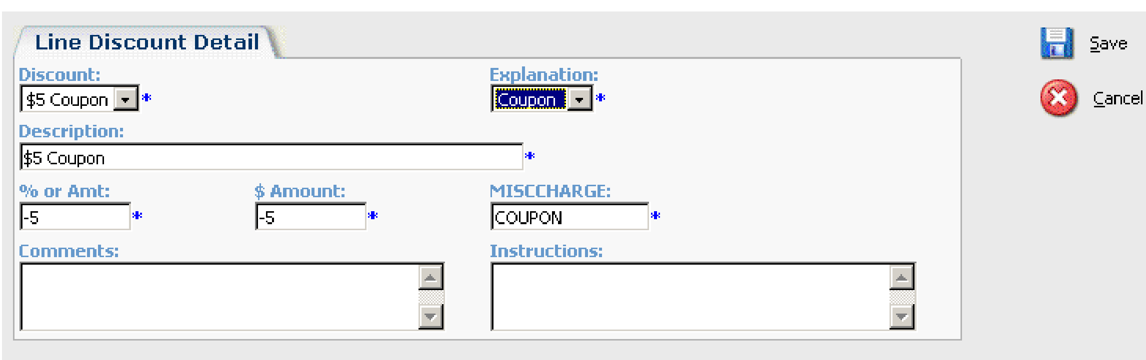
While under normal circumstances, “Discounts” would be negative dollar amounts. They do not need to be. For example, you could have a predefined “Service Fee” that many cell phone or similar companies have, that could be $5, and you could define that as one of the “discounts”, although it would be a positive dollar amount.

To add a new discount to an order, click the “Add Discount” option.



Note: If your “Discount” is configured to be an AAS Item (not miscellaneous charge) then it CANNOT BE NEGATIVE DOLLAR. While CRMOE will allow –ve dollar items to be entered as discounts, AAS itself will not, and the posting process will fail if these exist. Only miscellaneous charges can be negative dollar.

You will see the new discount window:



The CRMOE related fields on the Discount Entry pane are described below:

- Discount – The discount you wish to apply. Select the appropriate item from the list.

- Explanation – By default this field is required. Your system administrator may have changed this. Select one of the predefined “Reason” codes.
- Description – A description of the discount
- % of Amt: The % or amount of this discount. Percents are defined in decimal terms (0.03 = 3%). Which displays depends on how this discount is configured; as an amount or as a percentage.
- $ Amount: The dollar amount of the discount. This will be the same as the “% or Amt” if this is an amount discount.
- MISCCHARGE - Read Only - The AAS OE MISCCHARGE Code or ITEMNO associated with this discount.
- Comments: Any comments
- Instructions: Any instructions. This field only works if this discount is an item, and not a miscellaneous charge.

Click “Save” to add the discount to the order. Click “Continue”.

Line Item List

10 RecordsFound, Page 1 of 1

Detail ID	ITEM #	MISCCHARGE	Qty	Item Description	Unit of Measure	Unit Price	Extended Price
1,034		COUPON	1.00	$5 Coupon		-5.00	-5.00

You have successfully added a discount to the order.

Auto Freight

CRMOE includes the functionality to automatically calculate and add freight (shipping) charges to an order. Theoretically, this feature could be used for auto calculation and addition of any miscellaneous charge, but the most common use would be for freight charges.

If your system administrator has turned on and configured the included Auto-Freight features in CRMOE, then CRMOE will automatically add a new miscellaneous charge line to the order, once the appropriate matching freight record in the freight matrix is found.

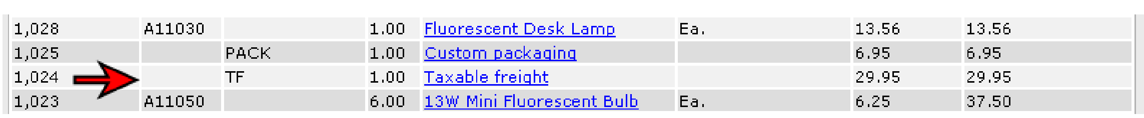
Added freight is based on the “Ship Via” you selected for the order, as well as the subtotal amount of your order, and can be configured based on subtotal ranges, and be either a fixed $ amount, or a percentage of the subtotal, for example:

Carrier (ShipVia)	Subtotal Minimum	Subtotal Maximum	Freight $ Amount	Freight %
Post Office	0	25	0	NA
Post Office	25.01	100	NA	0.10
Post Office	100.01	499.99	45.50	NA
Post Office	500.00	99999.99	NA	0.04

Therefore, if you selected the “Post Office” as the ShipVia, and your order subtotal fell into one of these ranges, an auto-freight line would be added to your order. In this example, orders under 25.01 are charged 0$ freight, while note 25.01 to 100 are charged 10% of the order subtotal. Additionally, those from 100.01 to 499.99 are charged a fixed amount of $45.50, and so on.

NOTE: The auto freight line on your order will be added or updated as soon as your order reaches the range threshold. If you were to then change shipvia to one that was not configured for auto-freight, the auto-freight line is NOT automatically removed. However, if you change to another ShipVia that is configured, and you click “Refresh”, the freight amount will be recalculated.

Your auto freight line will be added to the order and will look something like this:



1,028	A11030		1.00	Fluorescent Desk Lamp	Ea.	13.56	13.56
1,025		PACK	1.00	Custom packaging		6.95	6.95
1,024		TF	1.00	Taxable freight		29.95	29.95
1,023	A11050		6.00	13W Mini Fluorescent Bulb	Ea.	6.25	37.50

If you manually remove the line, while a Ship Via that is configured for auto-freight is selected, the line will be automatically re-added.

If you manually edit the line, while a Ship Via that is configured for auto-freight is selected, the lie will be automatically re-calculated.

The only method available to remove auto-freight from an order it is on is:

1. Change the shipvia to one that does not use auto freight, for example "None"
2. Edit the freight line, and delete it

Converting to Order

Once you have finished adding Items, Charges, Discounts, Freight and any other items to your quote, it is time to convert it to an order.

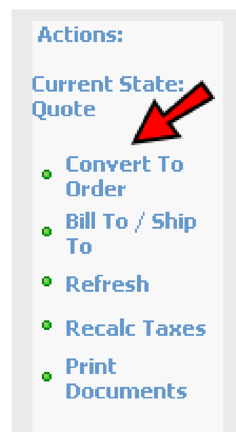
Converting to an order serves two purposes:

a) It creates a related Opportunity for this quote
b) It updates the Status, Stage and Type of the quote

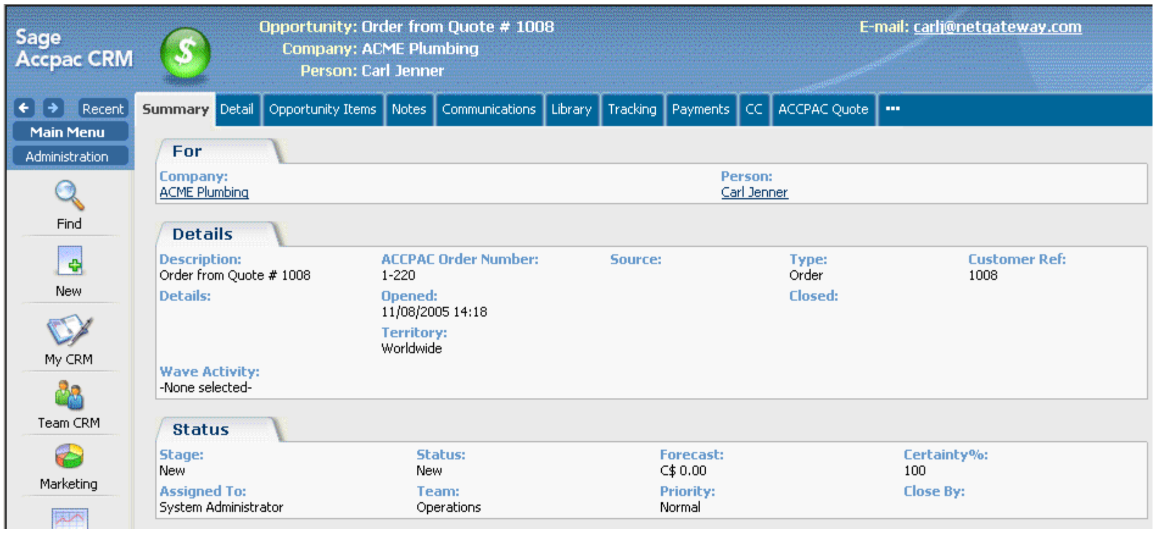
A related opportunity is created for several reasons:

- Opportunities, as inherent CRM objects have a special status within the software that CRMOE seeks to take advantage of. (for example, they can be tied to notifications such that clicking on a notification can bring you directly to the opportunity)
- Opportunities are the driving factor behind Forecasts, budgets, and all financial reporting in CRM itself. By using opportunities, financial reporting in CRM is preserved and all financial (sales) information flows through one place
- CRM users are already familiar with opportunities and therefore this decreases training requirements

To convert the quote to order, simply click the “Convert to Order” workflow option on the quote screen:



This will convert the quote to an order, and you will be directed to the opportunity context, for the new opportunity just created



You have converted your quote to order.

Accepting Payment

Prior to posting your order to ACCPAC, you must process payment. Payment can take numerous forms. CRMOE comes enabled for the following methods:

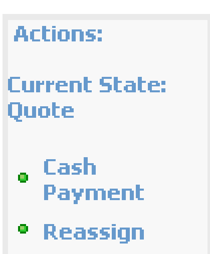
1. Credit Card (Electronically processed) – Electronic, integrated CC processing
2. Cash – Cash, or any other cash equivalent (money order, etc)
3. Check (Canada: Cheque) – Checks and similar instruments
4. 0$ Order – Orders that are 0$ are not "paid" but must pass through the payment process
5. On Account – Order that are being paid on account for invoicing and or payment later
6. Debit – Bank card. Referred to as "Interac" in Canada.
7. Manual EFT – Offline processed EFT.

CRMOE is capable of other forms of payment, with customization or reconfiguration:

- Offline Credit Card
- Integrated EFT (electronic checks)
- Installment payments
- Any other undefined form

Note: At this time CRMOE does not support split-payments, where the order is partially paid by one method, and paid again by another. This is a pending enhancement for the next version of this software.

Accepting payment is simple. The "Payment Method" you previously selected on the quote screen (Detail Tab of the Opportunity context) comes into effect here. The opportunity workflow will present you with a button relevant to your currently selected payment method. For example, in the order created above, we selected "Cash" as the payment method, therefore the opportunity workflow appears as such:



However, if we go back to the detail tab and change the payment method to "Visa", this option changes:

These two payment methods demonstrate the most significant difference in payments, and therefore we'll show them both here.

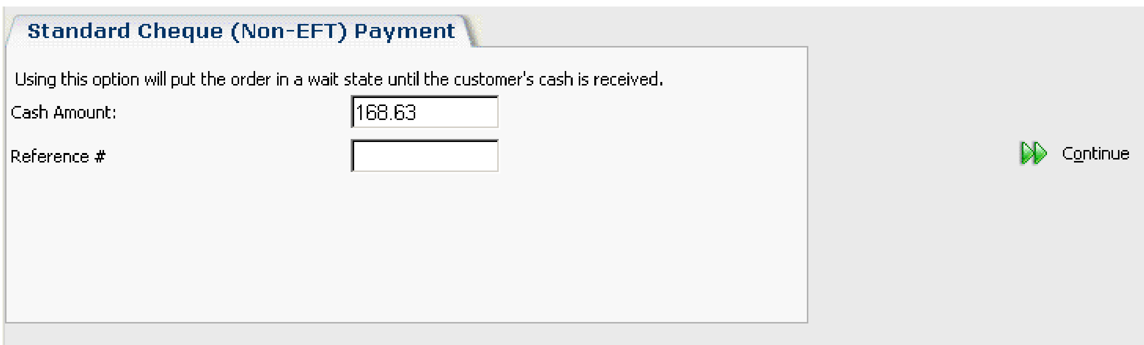
Cash Payments

Cash payments occur in two steps.

1. Record the pending receipt of the cash
2. Receive the cash and apply against the order.

Checks, Money orders, and debit all follow this same process.

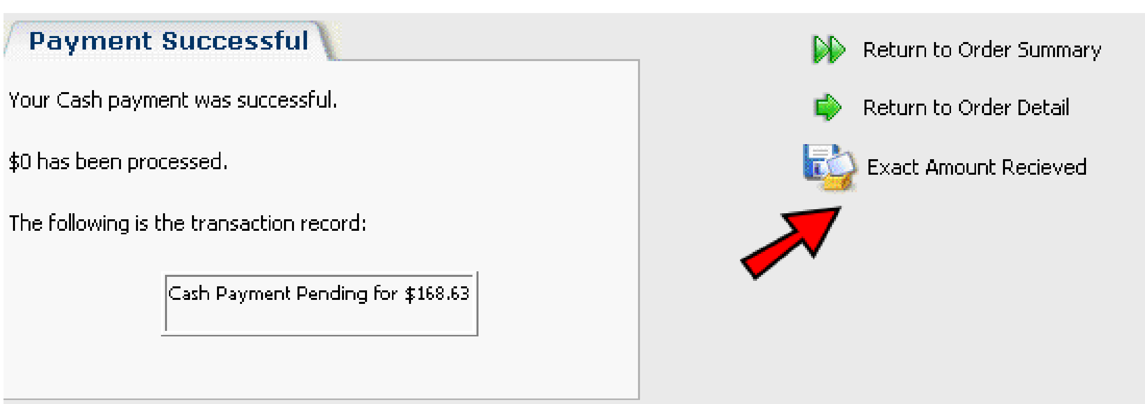
Click the "Cash Payment" workflow button:



You can now enter the amount of the pending cash payment, and, if you have one, a Reference #.

Note: if you do not enter a reference number here, CRMOE will automatically assign one, such that this CRMOE payment can be directly related to the AR Receipt that will be created upon posting to AAS.

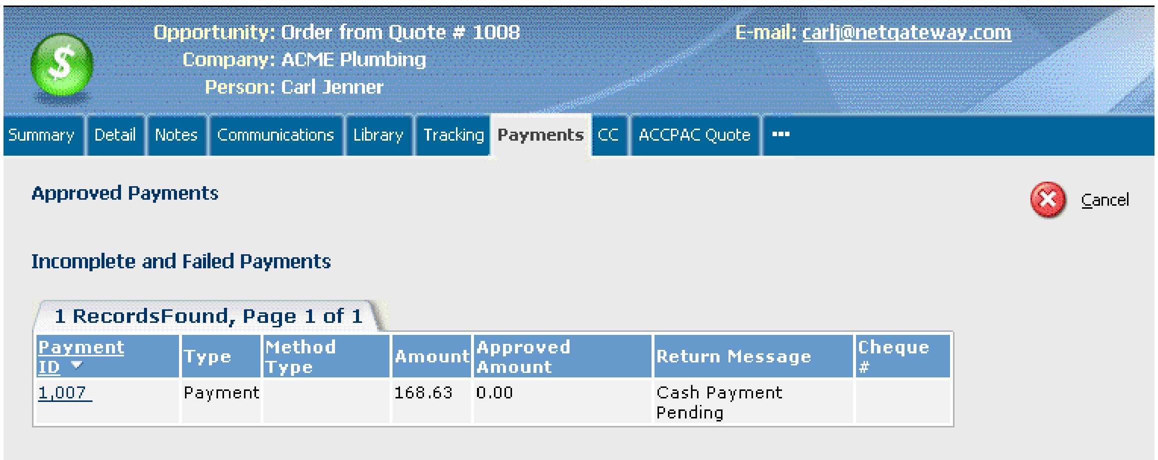
Click continue when you are satisfied with the entry. You will see a screen such as this:



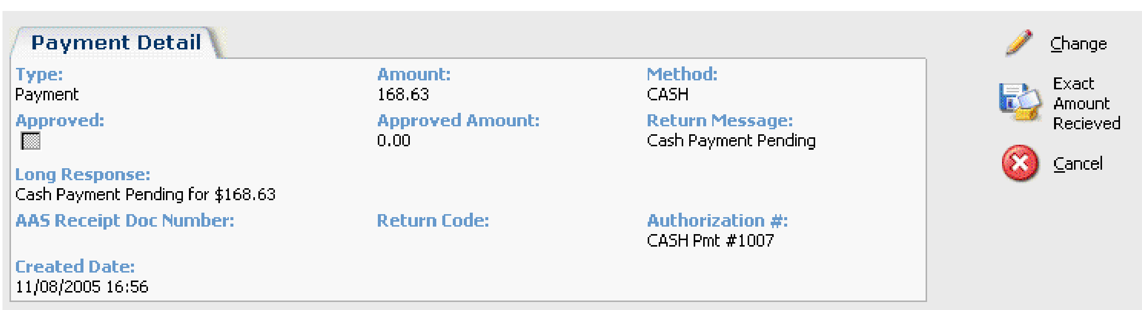
You may or may not see the button highlighted in the picture, depending on your user profile configuration. Any user can record that a cash payment is pending, but only authorized users can actually record the receipt of cash into the system.

If the cash is in hand, you should click the “Exact Amount Received” button if it is available to you. If you do not, you can come back to the payment later to do this.

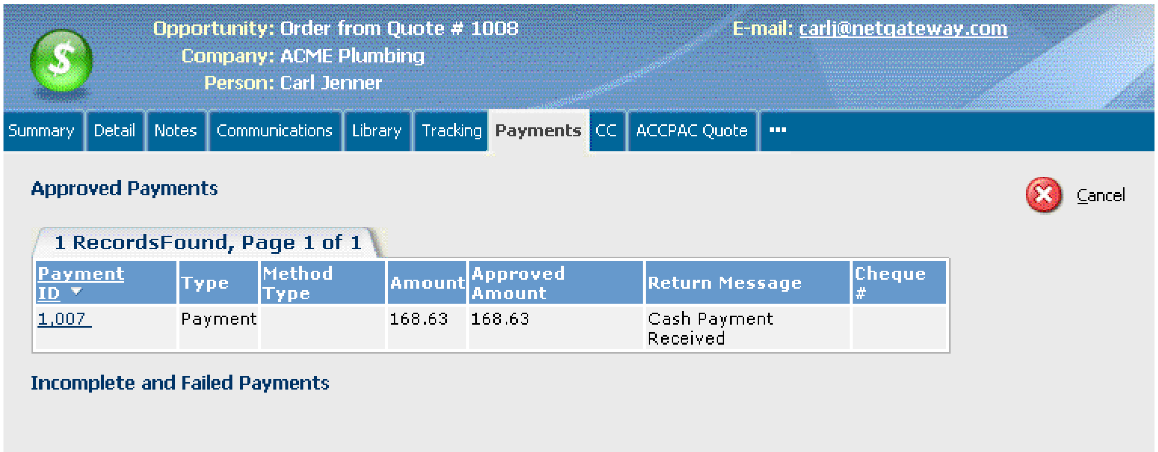
Returning to the payment to apply the cash can be accomplished by clicking on the “Payments” tab in the Opportunity context:



You will see a list of Approved (applied) payments, and incomplete / failed payments (unapplied). Click on the pending cash payment:



You’ll see the payment detail screen, which includes the same “Exact Amount Received” button as above. Click this button to apply the cash to the order:



The payment will move from the “Incomplete” section to the “Approved Payments” section, and will be applied to the order. You can see this by looking at the “Approved Amount” column.

If you return to the “Detail” tab, you will also see the payment has now been applied:

Here you can see the payment(s) applied, and the balance outstanding, which in this case is 0$, as the order has been completely prepaid.

You can now continue to post this order to ACCPAC.

Credit Card Payments

Integrated credit card payments in CRMOE are very simple. There are a few prerequisites to being able to use this feature:

- Your organization must have appropriate credit card merchant accounts
- Your organization must have subscribed to the E-xact payment gateway, or have made arrangements to have your CRMOE software customized to use your selected payment gateway
- Have the E-xact (or other provider's) payment gateway software installed and configured on the CRM server.

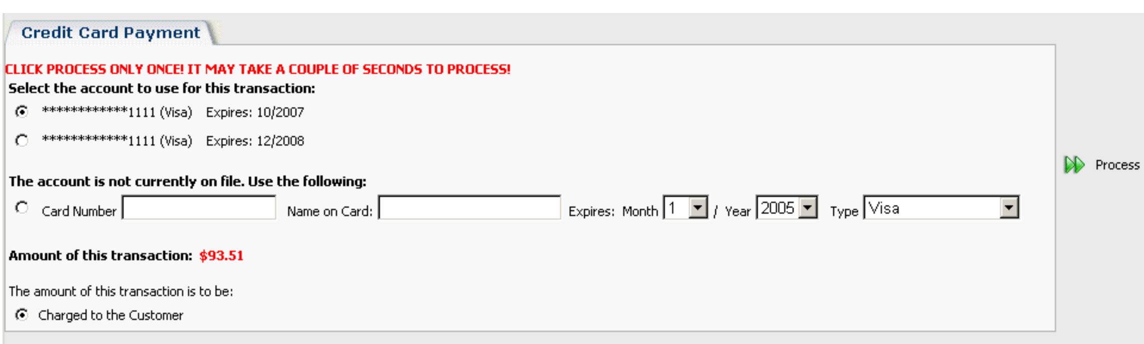
Provided these pre-requisites are satisfied, and you have selected "Visa", "Mastercard", or "American Express" as your payment method (AAS AR Receipt types: VISA, MCARD, AMEX) then your opportunity should display the "CC Payment" workflow action.

At this point you have one of 3 options as to how to process a credit card:

1. The credit card in question is already on file
2. Add the credit card to the customer's file now, independent of the order
3. Add the credit card to the customer's file during the payment process

To place a credit card number on file independently of processing an order, see the section "Placing Credit Card Information On File".

To use an existing, active credit card, or to put one on file during the payment process, click the "CC Payment" workflow button:



This screen presents you with two basic options:

a) Select an existing, on file, active account to use to pay for the order
b) Enter a new account to process this order, and put on file.

If you decide to use an existing account, then the only thing you must do is select the radio button next to the card, and click “Continue”.

If you decide to add a new account, then you must select the “This account is not currently on file” option, and enter the appropriate information:

a) The card number. Required. CRMOE will automatically verify this is a valid credit card number by way of a mathematical algorithm. This does not confirm the card is good, or even that it belongs to this person, only that the number itself adheres properly to the rules of credit card number generation. This will help you prevent things like inverse characters, typing errors, etc. If an error is detected, CRMOE will inform you, and will clear the credit card number from the field. CRMOE assumes the credit card, in all cases, is 16 characters. You may use the CC# “4111111111111111” for test purposes. (VISA, a 4 followed by 15 ones).
b) Name on Card: Required. Enter the card holder name.
c) Expiry Month: Required. Select the month the card expires from the select list
d) Expiry Year: Required. Select the year the card expires from the select list
e) Type: Select which card type this is. Visa/Master Card/American Express

Once your data entry is complete, click “Process” to process the payment.

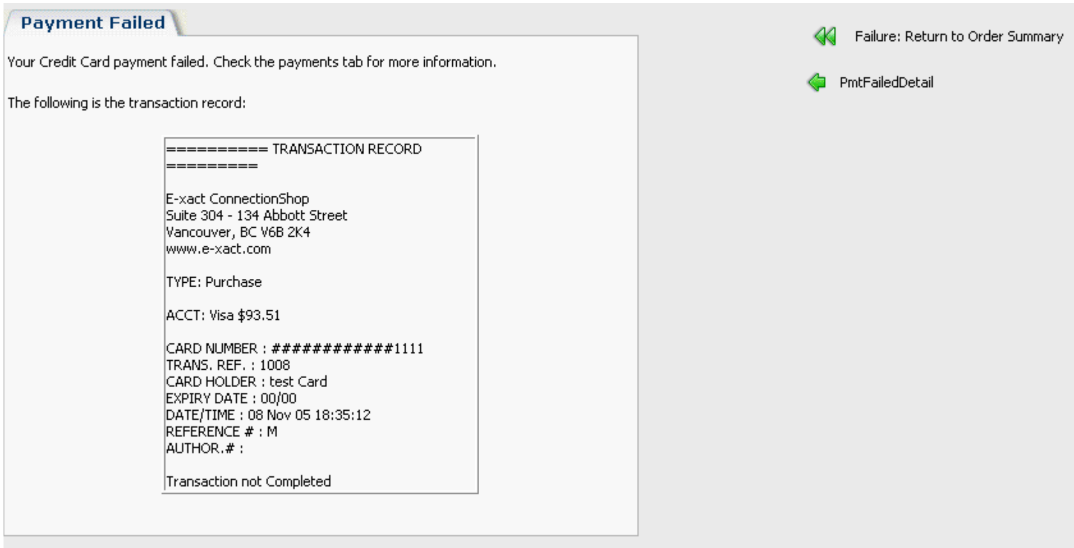
Note: When processing a credit card in real time, it may take several seconds until the transaction is complete. DO NOT CLICK PROCESS A SECOND TIME, or you risk double-charging your customer. While this is unlikely, it is possible. CRMOE has extensive protections in place to prevent this from happening. If you do click a second time, CRMOE will notify you that you have done so, and will prevent a resubmission. CRMOE will also prevent you from processing any more credit card payments during this CRM session. This means you will have to log out of CRM, close your web browser, and then log back in before you can process another CC Payment in CRMOE. Expect this behavior, it is by design.

You will now see one of two things:

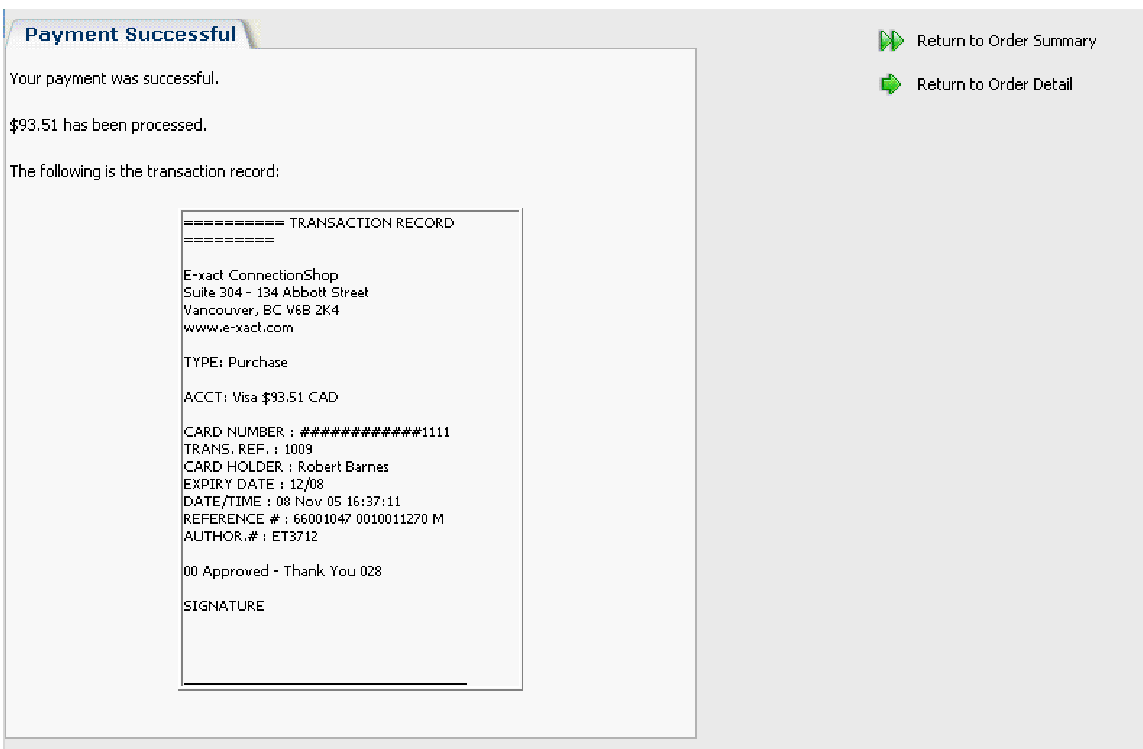
- Your payment failed
- Your payment was successful

In either case, a “Receipt” will be generated that looks much like the receipt you receive at a retail outlet when paying by credit card:

If the payment failed, the response should explain why. For example, insufficient funds, invalid card number, invalid expiry date, etc. In this case, return to the summary tab of the opportunity, and try again. This may require using another credit card.



If the payment was successful, then the payment will be applied to the order automatically. You can click on one of the “Return to Summary” or “Return to Detail” tabs, depending on where you would like to go.



- Return to Summary – click this button if you want to go back to the opportunity to look up additional information or confirm payment was applied.
- Return to Detail – click this button if you want to generate a document, for example, an invoice (prepaid), order confirmation, picking slip, or other configured document. You can, of course access these functions from the “Detail” tab at any time, but this button allows you to get there faster.

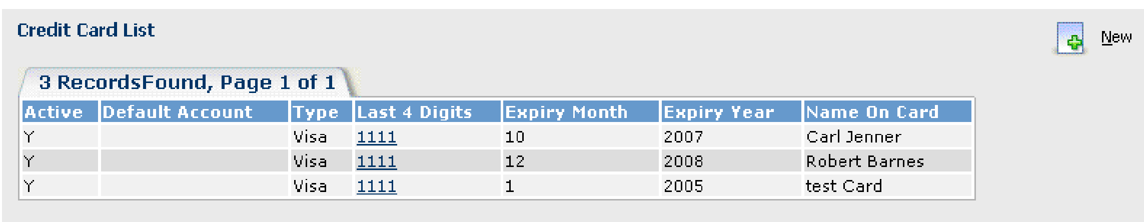
You have successfully paid for the order by credit card.

Placing Credit Card Information on File

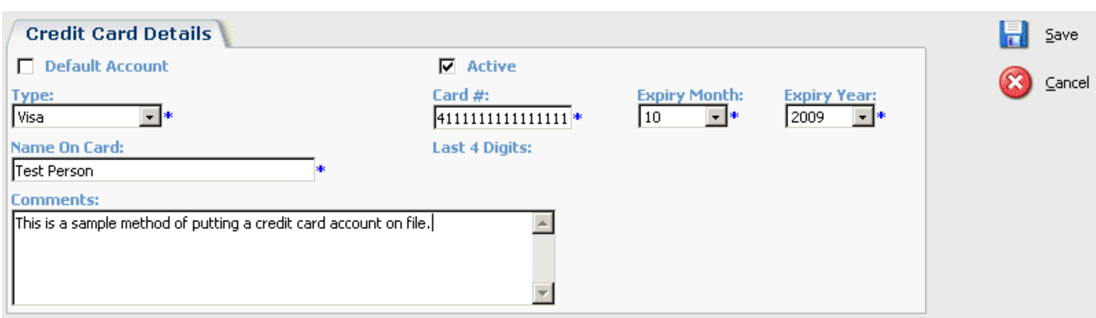
In the event that you want to place a credit card on file outside of the procedure of processing a payment, you can do so using the “CC” tab. The “CC” tab is found in the Company, Person, and Opportunity contexts.

When used in the Opportunity context, the credit card is also added to both the Person and Company contexts for future usage.

Click the appropriate “CC” tab. You will see a list of existing credit cards matching that context.



Click the “New” button to add a new entry



Fill in the details. A customer can only have one default account. If you wish to make this entry inactive, unselect the “active” checkbox. Doing so will prevent it from being displayed in the inline credit card processing list. This would be used for things like expired cards, etc.

Click “save” when you are done.

You have successfully added a credit card account to this customer’s file.

Posting to ACCPAC

Posting to ACCPAC is the processing transferring the quote from CRMOE to an active order in AAS. If so configured, CRMOE will also ship all and invoice all during the posting process. Contact your system administrator to find out how your system is configured.

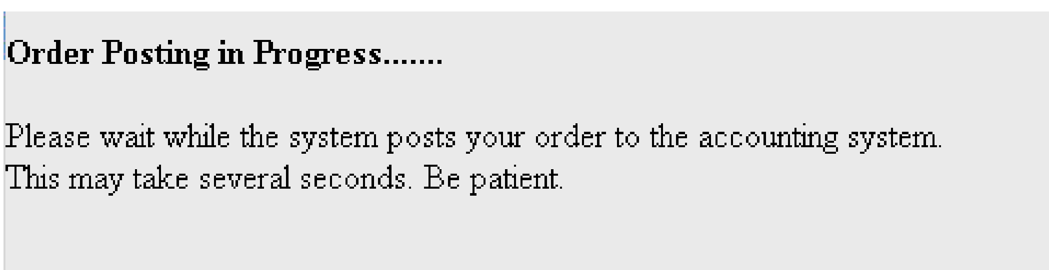
Return to the Summary tab in the Opportunity context. If your payment was successfully applied, you will see the “Post to ACCPAC” button. Click it.

Remember: You cannot “Post to ACCPAC” any order for a company that is not a customer. If this company is not a customer you must promote them to customer first.

Your screen should immediately change to a “please wait” message. Posting to ACCPAC can take some time – how much depends on numerous factors:

- The capabilities of the CRM server
- The number of users logged into, or using ACCPAC
- The load on your database server
- The speed of your network
- Any customizations made to CRM, CRMOE, or ACCPAC
- Other factors

In general, posting will take between 5 and 10 seconds to complete. Please be patient.

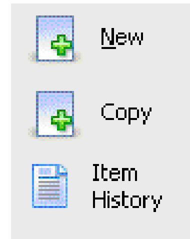


Once posting completes, CRMOE will automatically return to the Opportunity Summary context, and you will notice the name of the opportunity has changed to “ACCPAC Order from Quote XXXXXXXX”. This is by design.

You have completed the order processing procedure in CRMOE. Your CRMOE order is now an order in AAS.

You could now proceed to generate documents, or perform any other activities that you may have customized into your CRMOE workflow. In many cases, posting the order is simply a minor step in a larger order process, one that can include picking, shipping, tracking, approvals, etc. The limits of what is possible are purely up to you.

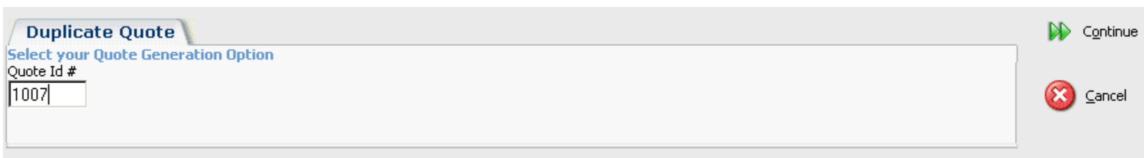
Copying Quotes



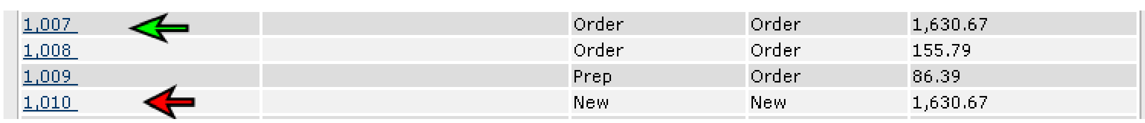
Quite often customers will re-order the same thing repeatedly, or will place orders that closely resemble orders they previously made.

To speed up order entry, therefore, CRMOE will allow you to copy an existing quote. All that is required is the quote number from the previous quote.

Click on the “CRMOE” tab in the company context. Click the “Copy Quote” button, enter the quote number, and click continue.



A new quote, with a new quote number will be created. It will contain all of the line items from the previous quote, including all pricing from that quote.



In this example, the green arrow points to the original order, the red to the copied order. You can see the subtotals are the same from the onset.

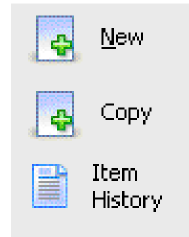
You can then alter it by adding, editing or deleting line items, charges or discounts.

Once you are ready, you can convert it to order in the same way as any other order.

You have successfully copied a quote.

Item History

It is often useful to have a quick method to find the past purchase history for a customer. However, looking up past orders and reviewing their contents is time consuming and tedious.



CRMOE therefore includes the “Order History” button which presents at an ITEM level a historical listing of previous purchases. This list can be sorted on whichever column you prefer, depending on the configuration made by your system administrator.

The list looks like the following:

Item / Invoice History List

16 RecordsFound, Page 1 of 1

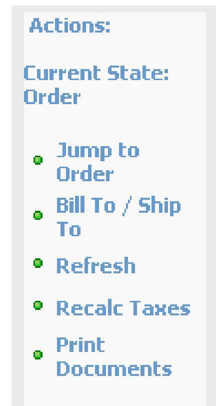
ordnumber	invnumber	item	desc	qtyordered	Unit Price	priceunit
ORD000000000016	IN0000000000014	A1-103/0	Halogen Desk Light	3	42.55	Ea.
ORD000000000016	IN0000000000014	A1-320/0	Image 1500 Series Desk Accessories	5	6.39	Ea.
ORD000000000016	IN0000000000014	A1-310/0	13W Mini Fluorescent Bulb	15	50.35	Ea.
ORD000000000017	IN0000000000015	A1-103/0	Halogen Desk Light	5	42.55	Ea.
ORD000000000017	IN0000000000015	A1-320/0	Image 1500 Series Desk Accessories	5	6.39	Ea.
ORD000000000017	IN0000000000015	A1-310/0	13W Mini Fluorescent Bulb	5	50.35	Ea.
ORD000000000018	IN0000000000016	A1-103/0	Halogen Desk Light	15	42.55	Ea.
ORD000000000018	IN0000000000016	A1-320/0	Image 1500 Series Desk Accessories	20	6.39	Ea.
ORD000000000018	IN0000000000016	A1-310/0	13W Mini Fluorescent Bulb	10	50.35	Ea.
ORD000000000046	IN0000000000044	A1-103/0	Halogen Desk Light	25	42.55	Ea.
ORD000000000046	IN0000000000044	A1-320/0	Image 1500 Series Desk Accessories	20	6.39	Ea.
ORD000000000052	IN0000000000050	A1-103/0	Halogen Desk Light	25	42.55	Ea.
ORD000000000058	IN0000000000056	A1-320/0	Image 1500 Series Desk Accessories	20	6.39	Ea.
ORQ1003	IN0000000000061	A1-760/0	Paper Clips	1	0.15	Box
ORQ1003	IN0000000000063	A1-401/0	Desk Calendar Pad	1	0.142361	Box
ORQ1004	IN0000000000062	A1-320/0	50W/12V Halogen Bulb	1	5.75	Ea.

This list contains the order number, invoice number, item number, description, unit price, quantity and unit of measure. Your list may look different, as it may have been customized by your system administrator. Use this as a quick reference to see what this customer previously bought, how much they paid for it, and when.

Generating Documents

An important part of the order entry process is the generation of documents such as order confirmations, invoices, etc.

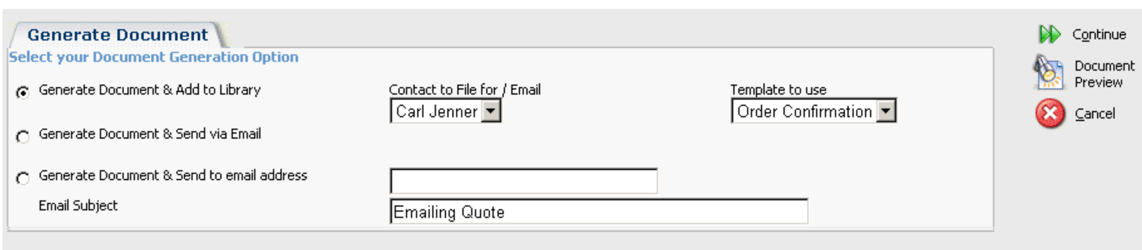
CRMOE can generate these documents for you at any point during the quote creation or submission process.



The documents that are available to you to be generated depends on the configuration your system administrator had made. The document selection is is specifically related to the “Type” field on the quote. Only templates matching the “Type” the quote is currently in will be displayed.

To generate a document open your quote, and click on the “Print Documents” workflow button.

Your screen will look like this:



You have 3 options:

a) Generate Document & Add to Library
   - Generate the selected document and file it in CRM’s library. The document could be printed and mailed or faxed using this option
b) Generate Document & Send via Email
   - Generate the document and send via email. Using the “Contact to file for / email” the document would be generated and emailed to the individual at the email address on file.
c) Generate Document & Send to email address
   - Generate the document and send to an email address of your choosing. Type the email address into the text box next to this option.

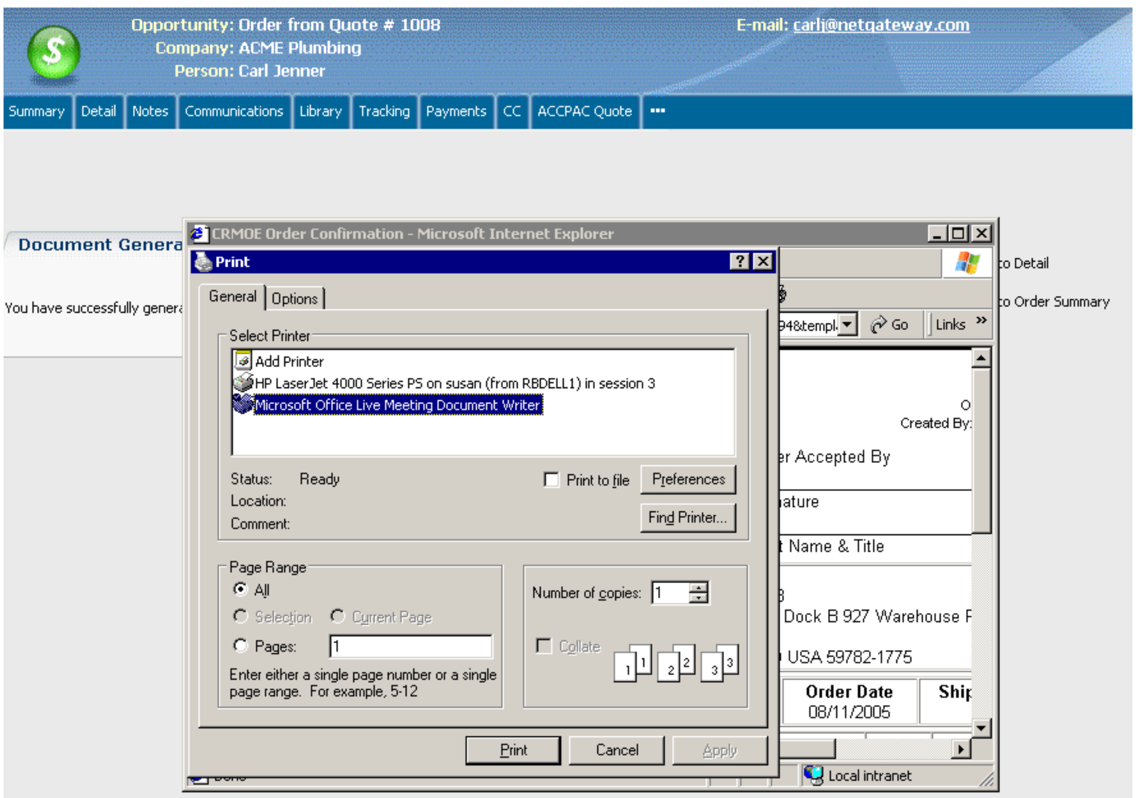
You must also specify:

- Template to use: select the document you wish to generate. This list is determined by your system administrator
- Email Subject: A default subject is provided. You can change this to whatever text you find appropriate.

You can click on the “Document Preview” button at any time to see what the document will look like when its generated. Using this button does “generate” a document, which can be printed, but does not send or otherwise file the document. Use this option like a print preview.

Note: Your document may, or may not include a code that immediately brings up the windows PRINT dialogue. Be careful about emailing documents that contain this command, as the receiver may not be able to receive documents with this embedded code.

Upon clicking “Continue”, CRMOE will pop open a new window with your document preview, and will back-load the actual generation completion screen. The document generated here automatically opens the print dialogue.



If this occurs for you, you can click “Print” to send this to the printer. If you have an Adobe PDF generator on your machine, you can also convert this document to PDF.

The sample order confirmation looks like this when generated:

21ST CENTURY SYSTEMS
End-to-End Enterprise Solutions from Business Professionals

Order Confirmation

Date: 08/11/2005
Quote #: 1008
Ordered by: Carl Jenner
Created By: System Administrator

GST R13495 6408 RT0001
1600 Gamble Place, 2nd Floor
Winnipeg, MB R3T 3L7
Canada

Phone: 204-452-9230
Fax: 204-992-2266

Order Accepted By

Signature — Date

Print Name & Title

Sold To:	**Ship To:**
Carl Jenner 927 Warehouse Road Kansas City MO 59782-1775	Receiving Dock B ACME Receiving Dock B 927 Warehouse Road Kansas City, MO USA 59782-1775

Reference	PO Number	Customer No	Salesperson	Order Date	Ship Via	Terms
	POABC029	1210		08/11/2005		

Qty	Item #	Description	Unit Price	UOM	Extended Price
6.00000000	A11050	13W Mini Fluorescent Bulb	6.25	Ea.	37.5
1.00000000	TF	Taxable freight	29.95		29.95
1.00000000	PACK	Custom packaging	6.95		6.95
1.00000000	A11030	Fluorescent Desk Lamp	13.56	Ea.	13.56
1.00000000	A11050	13W Mini Fluorescent Bulb	7.1	Ea.	7.1
1.00000000	A14000	Desk Note Book	24.95	Ea.	24.95
2.00000000	A14500	Bulletin Board	17.7	Ea.	35.4
1.00000000	A18000	Wastebasket	4.18	Ea.	4.18
1.00000000	A16550	Pen	1.2	Ea.	1.2
1.00000000	COUPON	$5 Coupon	-5		-5

Comments — My comments

Subtotal **$155.79**

Taxes **$12.84**
Total **$168.63**

This document can be customized by your system administrator.

Once the print preview is closed, you can see the back-loaded completion screen:

Document Generation Complete

You have successfully generated your document for CRMOE Quote 1008. It has been sent and or filed as requested.

Go to Detail
Go to Order Summary

Click the appropriate “Go To” button depending on where you would like to proceed to.

You have successfully generated a document in CRMOE.

Other Topics

Customization Notes

If you are planning to customize CRMOE or the CRMOE interface, there are several things you should be aware of:

- The crmoe\includes folder contains an ASP file: “custom.asp”, which remains unencrypted and is specifically there for your use in customizing events, buttons, security, etc that occurs during the order entry process. This is the previously mentioned developer “Interjection” point.
- Most of the functional actions (buttons) are managed by the “Quote Workflow” and “Opportunity Workflow” and are available for customization
- There are numerous fields on the Quote and Quote detail screens that cannot be removed, hidden, or otherwise adjusted.
    - Quote Screen
        - All fields that have been labeled as “required”.
        - Quote ID, Company, Person, Order
    - Quote Detail Screen
        - All Required Fields
        - Standard Cost

The CRMOE application itself is a developer’s application programming interface, and can be instantiated from ASP pages, Visual studio objects, Cold Fusion pages, etc. The API contains dozens of useful methods and properties that are easy to use and powerful. Many of these API methods wrap the ACCPAC Advantage Series object in an easier to use format as well.

If you have inquiries about customization of this, or any of CRM Systems CRM extension products, please contact your software provider.

Known Issues & Troubleshooting

At this time there are no known issues with the CRMOE software.

If you experience any issues, please report them to us contacting your software provider, or, if you are a CRM Systems partner, by logging into our online self-service support portal at http://www.CRMsystems.com and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

For further assistance you can contact us:

CRM Systems Inc.
201 - 1335 Erin Street
Winnipeg, MB, Canada
R3E 2S7
Phone: 1.204.480.9772
Email: support@CRMsystems.com

Online: http://www.CRMsystems.com

Electronically submitted support requests generally will be responded to the fastest. Please consider using that option.