Remote Sales Portal

The Remote Sales portal allows a mobile salesperson to access and update SouthWare orders and manage customer relationships over an internet connection. The layout and functionality of this portal are optimized for tablet and touch screen use.

Feature Highlights

Highlights of features included in the portal include:

- Easy tabbed access to major categories of sales-related info
    - Each tab maintains its state to give you multiple open desktops
- Start Tab for overview and find functions
    - Order status and trends
    - Invoice trends
    - Task status
    - Pipeline status
- Global Find/Navigate
    - Search by name or document number
    - Find includes all major files
    - Zoom from search list to related details portal
- Accounts Tab
    - Summary of all accounts
    - Find account by name or list all accounts
    - View A/R aging for accounts
    - Add a new prospect record
- Customer Account Portal
    - Summary and overview
    - Access to contacts
    - All open orders and past invoices
    - Sales opportunities
    - Tasks
    - Receivables
    - Service Orders
    - Service Contracts
    - Notes and Extended Data
- Prospect Account Portal
    - Summary and overview
    - Contacts, opportunities, tasks, notes, Extended Data
- Contact Portal
    - Summary and overview
    - Tasks, notes, and Extended Data
- Orders Tab
    - Orders summary and overview
    - Inquire a stock item
    - List orders and quotes and invoices

    - Add a new customer
    - Access an existing order
- Order Entry
    - General order header and totals info
    - Line item entry including search and recent customer purchases
    - Miscellaneous charges
    - Shipping info
    - Optional signature capture
    - Optional payment entry
    - Text entry
    - Notes and Extended Data
    - Optional Order Summary page (with signature) for review and/or printing
- Service tab
    - Listing of service orders
    - Option to view (optional edit)
- Tasks tab
- List of tasks (open or closed) with zoom options
- Option to add new task
- Pipeline tab
    - Analysis of sales opportunities including forecast, stage funnel chart, stage analysis, and opportunity listing
- Analysis tab
    - Multiple analysis charts and lists including sales pipeline, monthly sales, and commission sales

Setup Requirements

The Remote Sales portal is designed for use from an external browser. It does require a valid NetLink user login and related license seat.

To use this portal, a SouthWare salesperson's operator login must have:

- An order entry security level access of at least 5
- A default Order Entry operator (IS-07-11) assigned to the login operator since this is the operator that will be used within the portal
- A salesperson assigned to the login operator

Product Licensing

- Requires SouthWare Order Entry license
- Requires SouthWare TaskWise license
- Requires ExecuMate II license for most graphs
- Requires use of NetLink for outside browser access

Accessing the Remote Sales Portal

You may access this portal from the MTHUB request that is displayed when you log in via the MTLOGIN request. You may choose between Wide and Narrow navigation modes:

- Wide mode shows the side buttons and hides the tab labels
- Narrow mode shows the tab labels and hides the side buttons

SouthWaremobile Hub

The login for SouthWare Mobile takes you to the Mobile Hub container. The toolbar at the top of the page provides access to the Remote Sales portal and provides some general mobile options:

- **Select App** – Select Remote Sales App as the application.
- **Refresh Hub** – Refreshes the Hub page and reloads the last app.
- **Options**
    - **Set Zoom Size** (ipad only) – On the ipad ios the pages in the portal can use the browser webkit feature to adjust the font/zoom size of the pages for better readability. By default pages are displayed at 125% of normal. You may adjust this percentage via this feature, and any portal pages launched from the Hub will reflect the changed percentage. This is saved as a default for your operator, so if you change this temporarily you will need to reset it to the standard default.
        - Please note that if you change the percentage the Hub will refresh and any pages must be reloaded.
    - **Show/Hide Hub Toolbar** – You may show or hide the Hub toolbar via the Options selection or via the button shown at the left of the toolbar.
    - **Switch Navigate Right/Left** – The navigate buttons for the portals may be displayed on the left or the right of the pages. By default they display to the right, but you may choose this option to toggle between the left and right positioning.
    - Please note that each time you change this option the Hub will refresh and any pages must be reloaded.
- **Log Out** – Logs out of the portal session and displays a screen that allows you to start a new login session.

Remote Sales Hub

When you access the Remote Sales portal you will see a set of tabs that help organize the major areas available in the portal:

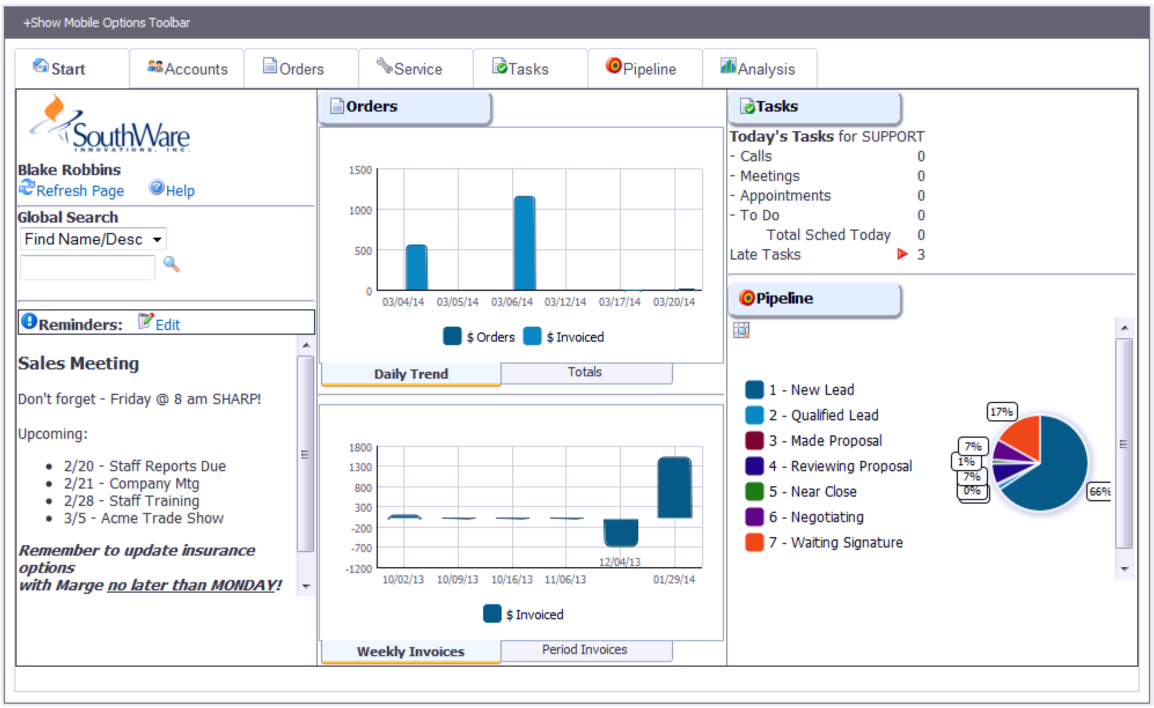
- Start (default)
- Accounts
- Orders
- Service
- Tasks
- Pipeline
- Analysis

You may click on any tab as outlined in the following sections. The state of each tab is maintained when you switch tabs so that you may switch between multiple active screens.

Start Tab

The Start Tab contains the following components:

- An overview of key indicators with related links
- An Reminder pane with current company news and reminders
- A global find function by name or document number



Start Tab

Key Indicators

Info available in this page:

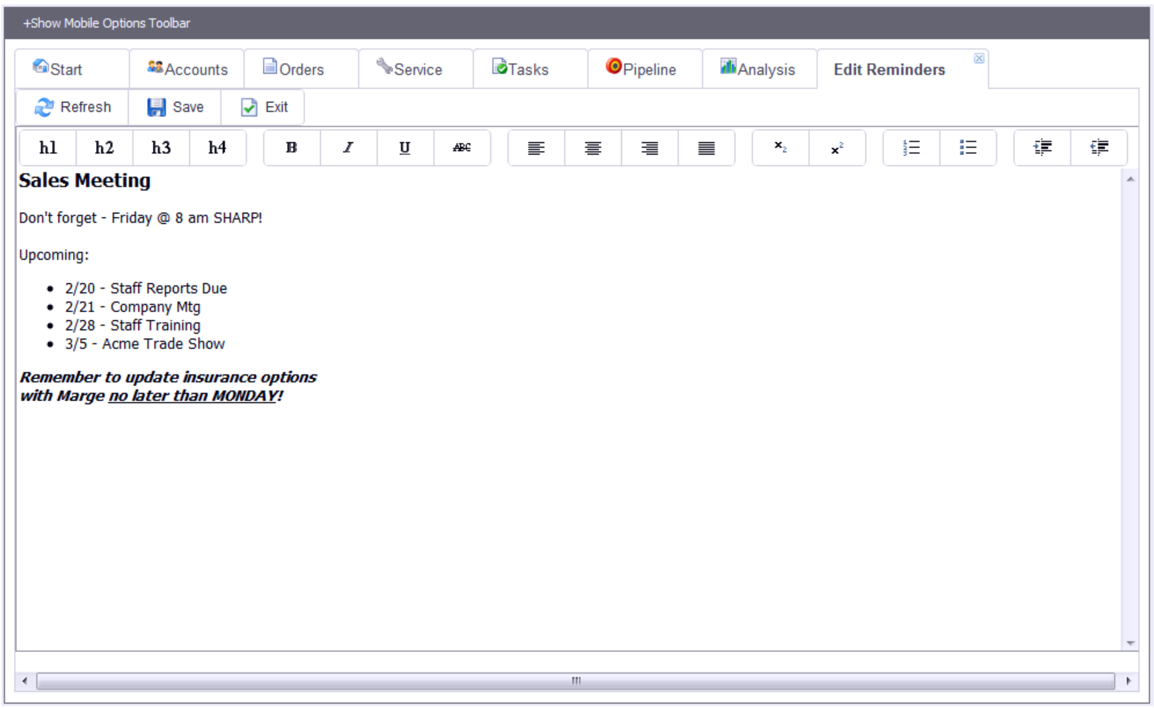
- **Orders**– A graph displays the daily trend for order amount and invoice amount for your salesperson code. A Totals tab also shows current open order totals.
- **Invoices –** Two graphs are available with invoice info for recent weeks and periods.
- **Tasks –** Totals are displayed for tasks scheduled for today.
- **Pipeline** – A graph shows the current breakdown of your open sales opportunities.

Reminder Pane

The reminder pane is the lower left portion of the start page and is intended to be an online bulletin board of announcements and reminders for salespeople..

Reminder Editing

The contents of this pane may easily be edited by any operator with a security level of at least 8 in Accounts Receivable.   Click on the Edit link to display the Editing tab.



Reminder Editing

In the Reminder Editing tab you simply edit the text and format it as desired using the formatting buttons at the top. These are similar to most text editor functions. To save your changes click on the "Save" button – the button will display a check mark when the text is successfully changed and updated in the Start page. Press the Exit button to close the Editing tab.

Note:

The reminder text is stored in a TaskWise AnswerReady record with the key of "8888888888888888".

Global Find Function

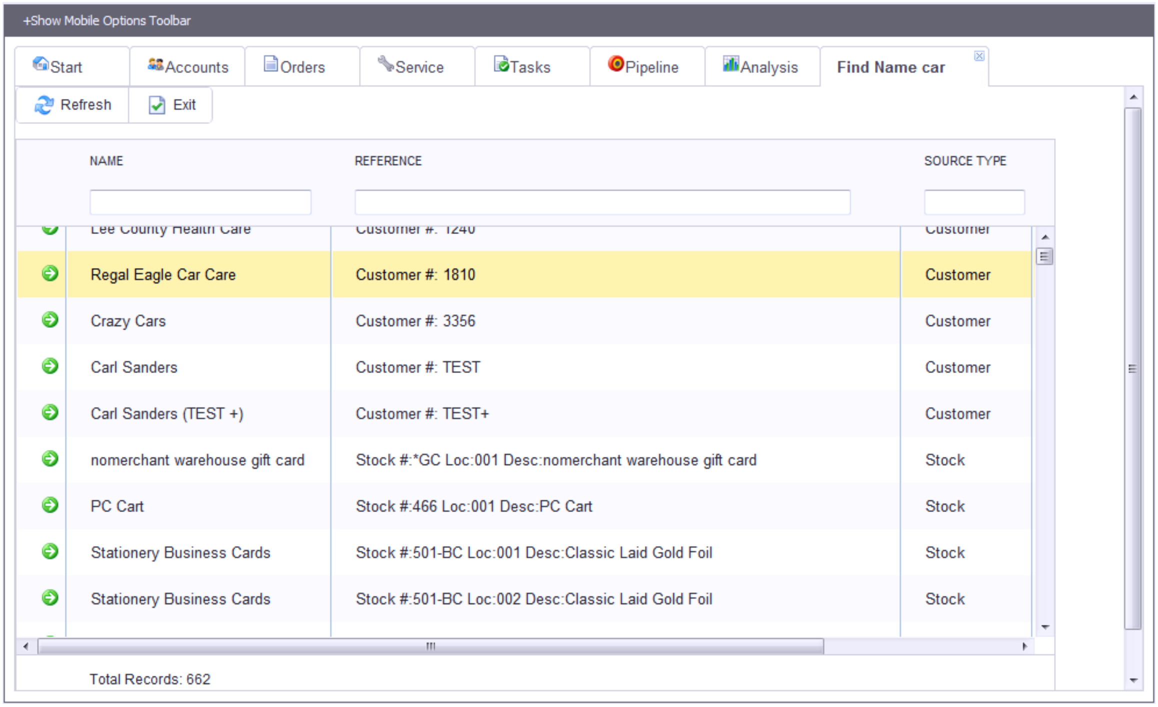
The Global Find/Navigate feature lets you search for documents or other records across all major SouthWare files, then zoom to the related detailsl for a record. This means you don't have to know which portal to access for a search – you can search and then instantly zoom to the appropriate portal.

In the Find field you may select the type of search:

- **Name** – Select the Name option and then enter a name or partial name in the search field. This does a mask match (wildcard) search within the following files:
    - Sales order – bill to name and ship to name
    - Service order – service order customer name
    - Job – description lines
    - Stock Item – key word file
    - If using TaskWise:
        - Relationship name
        - Contact name
        - Task reference
        - Project relationship name
    - If not using TaskWise
        - Customer file – name
        - Vendor file – name
        - Employee file - name
- **Document#** - Select the Document# option and enter a document number in the search field. This launches a search for the document number in the following files:
    - Sales order – order # and customer PO #
    - Service order – service order #and customer PO #
    - Invoice – invoice #
    - A/R open items – document #
    - A/R sales transactions – document #
    - A/R cash receipts – check #
    - A/P open items – document #
    - A/P transactions – document #
    - Jobs – job #
    - Purchase orders – purchase order #

Find List

When you launch a find the Remote Sales portal will create a new tab with the search results.



Example Find List

The list shows all matching records for the name or document # you entered.

- The “Source Type” column shows the file in which the record was found.
  - If you are using TaskWise, any relationships will show the Source Type as the customer, vendor, or employee file rather than the relationship file.
- If the search results in a large number of records you may use the column filters to further refine the search.

Zoom Options

When you click on the green arrow to zoom to a record the resulting zoom is based on the Source Type. For example, if you choose to zoom on a customer you will go to the related customer portal view.

Accounts Tab

The Accounts Tab provides access to all your customers and prospects and contacts.

Navigation within the Accounts Tab

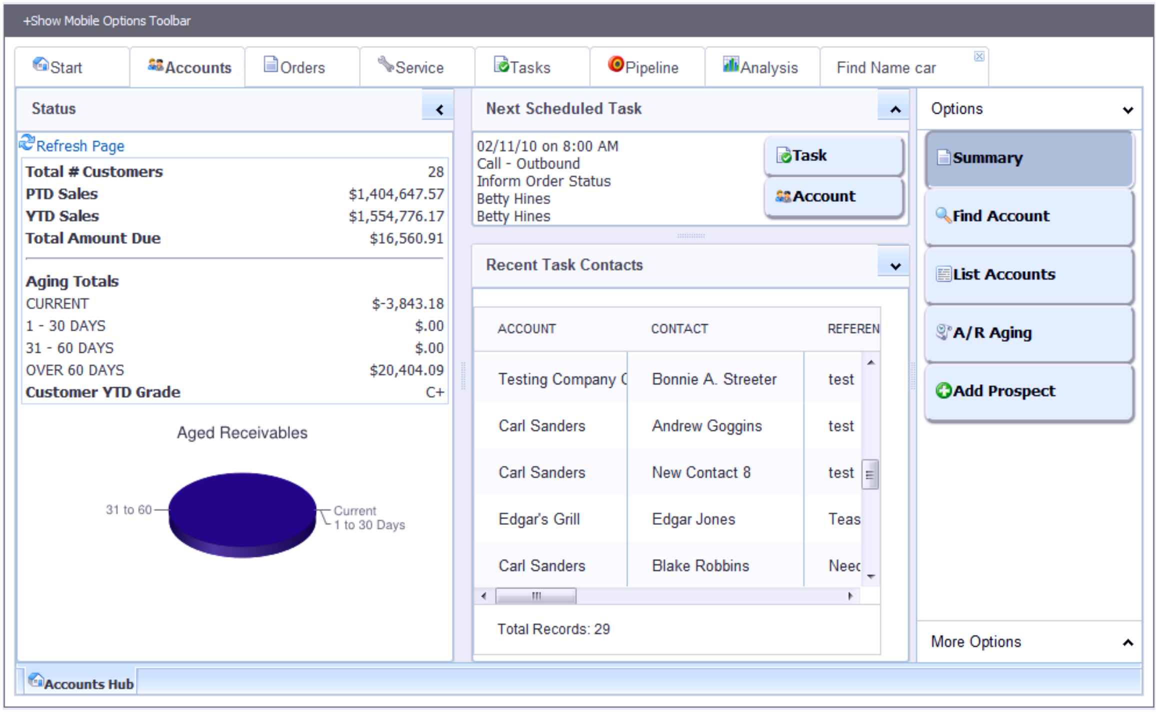
You may use any of the following methods to access the Accounts pages:

- Buttons
  - The buttons that appear to the side of the page are typically the easiest method to switch between pages. These buttons may appear on the left or the right of the page as configured in the "Options" button of the SouthWare Mobile Hub page.
  - You may choose to hide these buttons via the Options button of the toolbar.
- Tabs
  - The pages may be accessed as tabs if you choose to display tabs toolbar Options.
  - You may choose to show these tabs via the Options button of the toolbar.
- Dropdown Selections
  - The pages are also accessible from the dropdown "Options" button in the toolbar.

Summary

The Summary page provides an Accounts overview and contains the following sections:

- Status Info – shows some totals and info about your accounts
- Next Scheduled Task – shows the next scheduled task with links to the task and the account
- Recent Task Contacts – shows the most recent task contacts – you can click on one of the contacts to quickly access that account



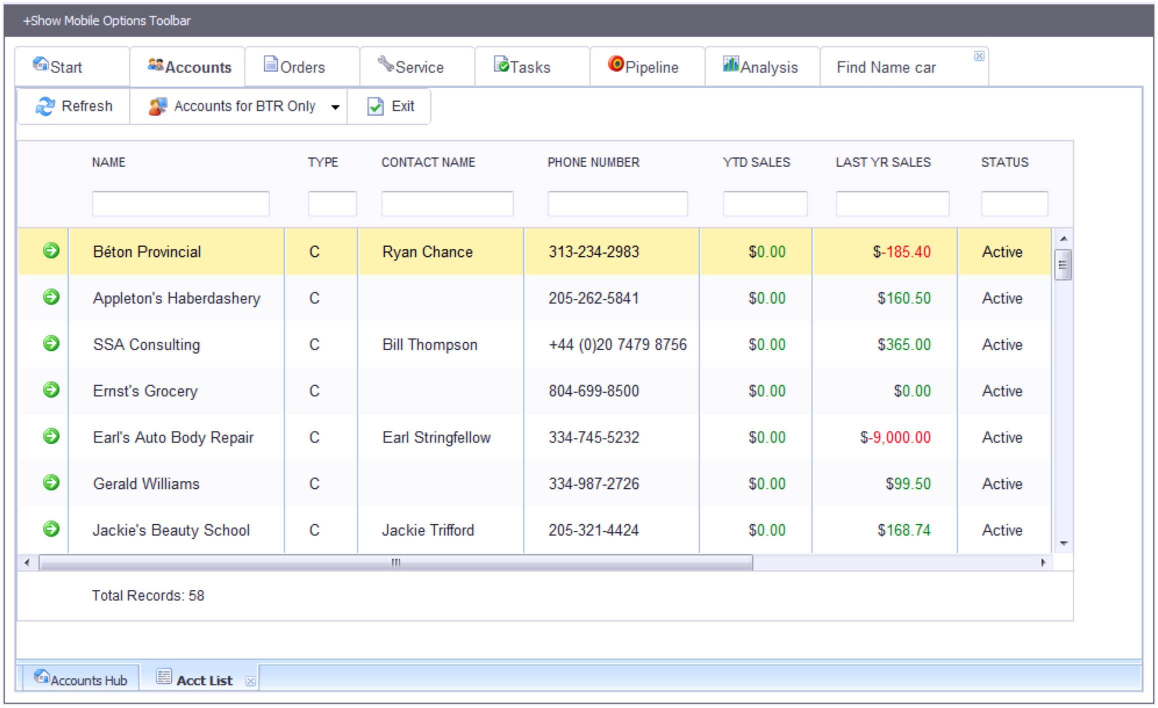
Account Summary page

Find Account

This function lets you enter a name or partial name and display a list of accounts and/or contacts with that name. You may then select a record from the list to zoom to it.

List Accounts

This function displays a list of all accounts assigned to your salesperson. You may also use the toolbar options to include all group accounts that you may access. Select a record from the list to zoom to it.

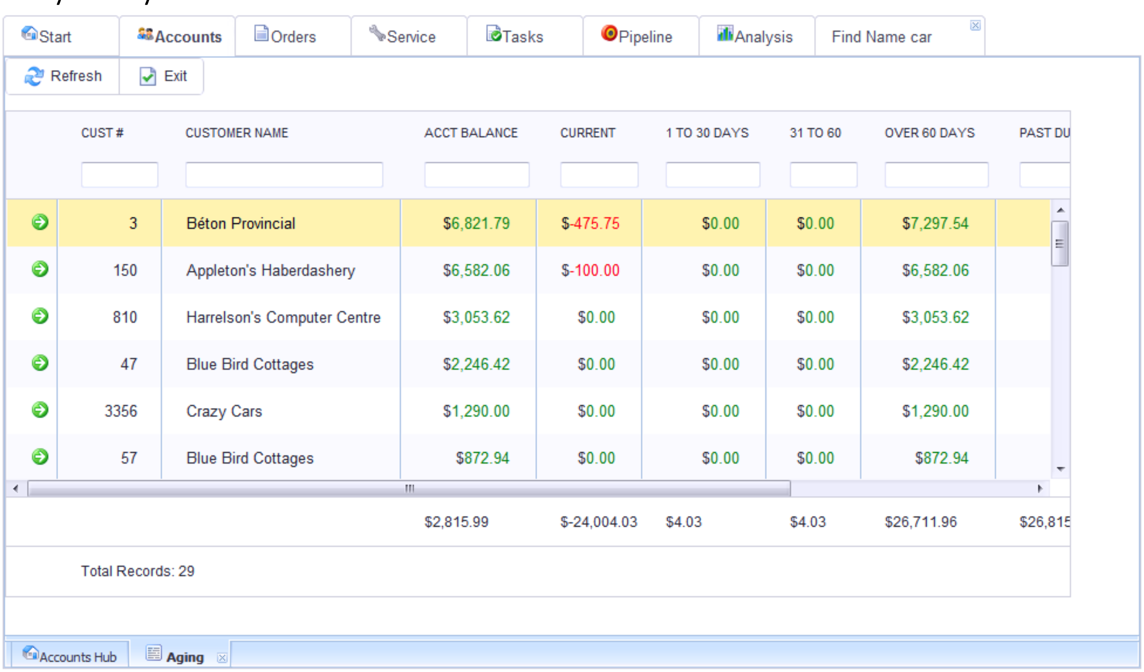


	NAME	TYPE	CONTACT NAME	PHONE NUMBER	YTD SALES	LAST YR SALES	STATUS
	Béton Provincial	C	Ryan Chance	313-234-2983	$0.00	$-185.40	Active
	Appleton's Haberdashery	C		205-262-5841	$0.00	$160.50	Active
	SSA Consulting	C	Bill Thompson	+44 (0)20 7479 8756	$0.00	$365.00	Active
	Ernst's Grocery	C		804-699-8500	$0.00	$0.00	Active
	Earl's Auto Body Repair	C	Earl Stringfellow	334-745-5232	$0.00	$-9,000.00	Active
	Gerald Williams	C		334-987-2726	$0.00	$99.50	Active
	Jackie's Beauty School	C	Jackie Trifford	205-321-4424	$0.00	$168.74	Active

List Accounts

A/R Aging

This function displays A/R aging info for your accounts. All accounts with a non-zero balance are list, and you may zoom from the list to the account.

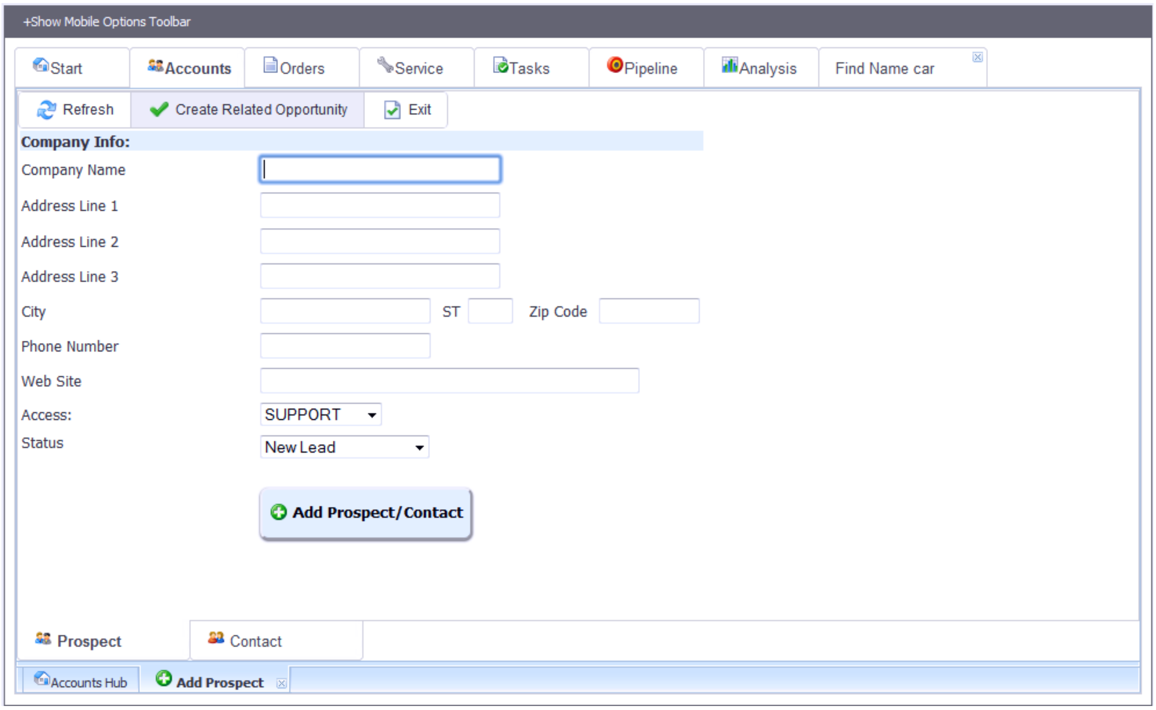


	CUST #	CUSTOMER NAME	ACCT BALANCE	CURRENT	1 TO 30 DAYS	31 TO 60	OVER 60 DAYS	PAST DU
	3	Béton Provincial	$6,821.79	$-475.75	$0.00	$0.00	$7,297.54	
	150	Appleton's Haberdashery	$6,582.06	$-100.00	$0.00	$0.00	$6,582.06	
	810	Harrelson's Computer Centre	$3,053.62	$0.00	$0.00	$0.00	$3,053.62	
	47	Blue Bird Cottages	$2,246.42	$0.00	$0.00	$0.00	$2,246.42	
	3356	Crazy Cars	$1,290.00	$0.00	$0.00	$0.00	$1,290.00	
	57	Blue Bird Cottages	$872.94	$0.00	$0.00	$0.00	$872.94	
			$2,815.99	$-24,004.03	$4.03	$4.03	$26,711.96	$26,815

A/R Aging

Add Prospect

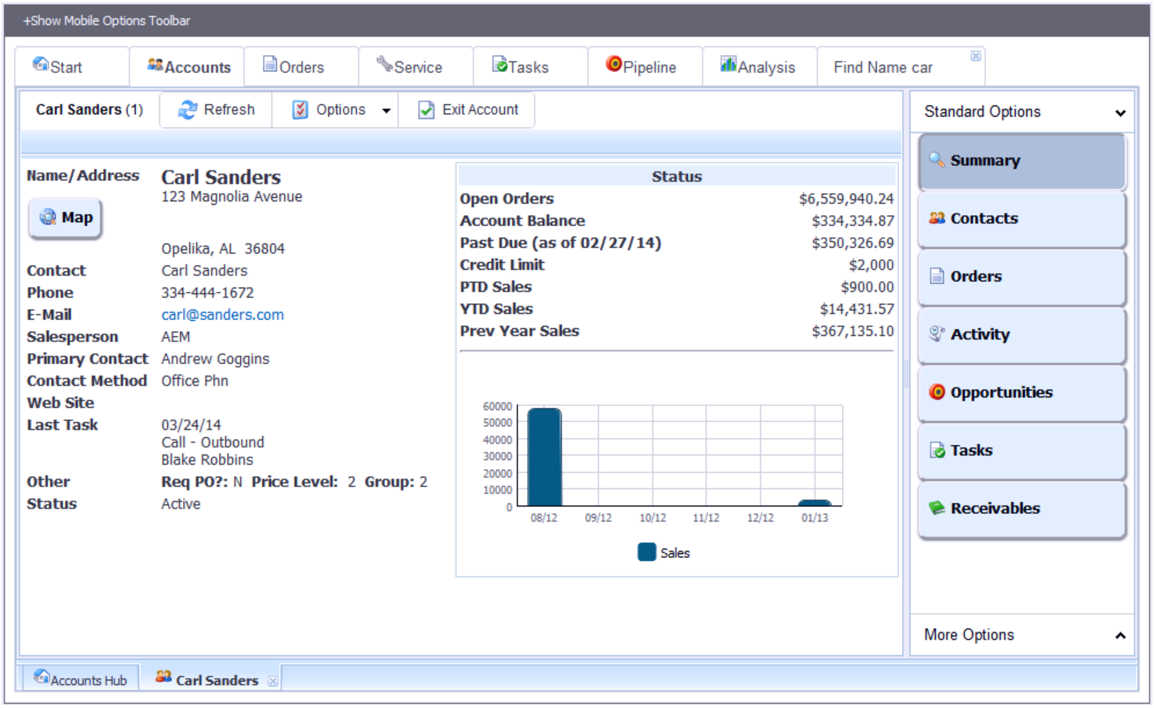
This function displays a screen for adding a new prospect. Tabs allow you to add both the relationship and the contact records, and the toolbar gives the option to create a new sales opportunity record after the prospect is added. Please note that the contact address and phone info defaults from the account, so enter the prospect info first and then switch to the contact to complete any missing info.



Add Prospect

Customer Account Portal

When you zoom on a customer the account portal gives you quick access to available info for that customer.

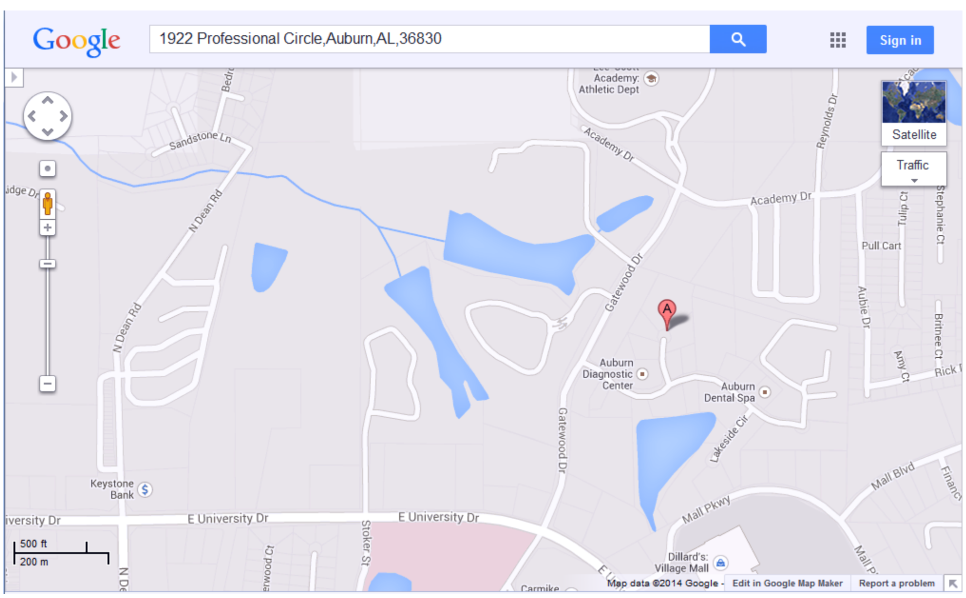


Customer Summary page

Summary Info

The Summary page shows standard info for the customer, status totals, and sales trends.

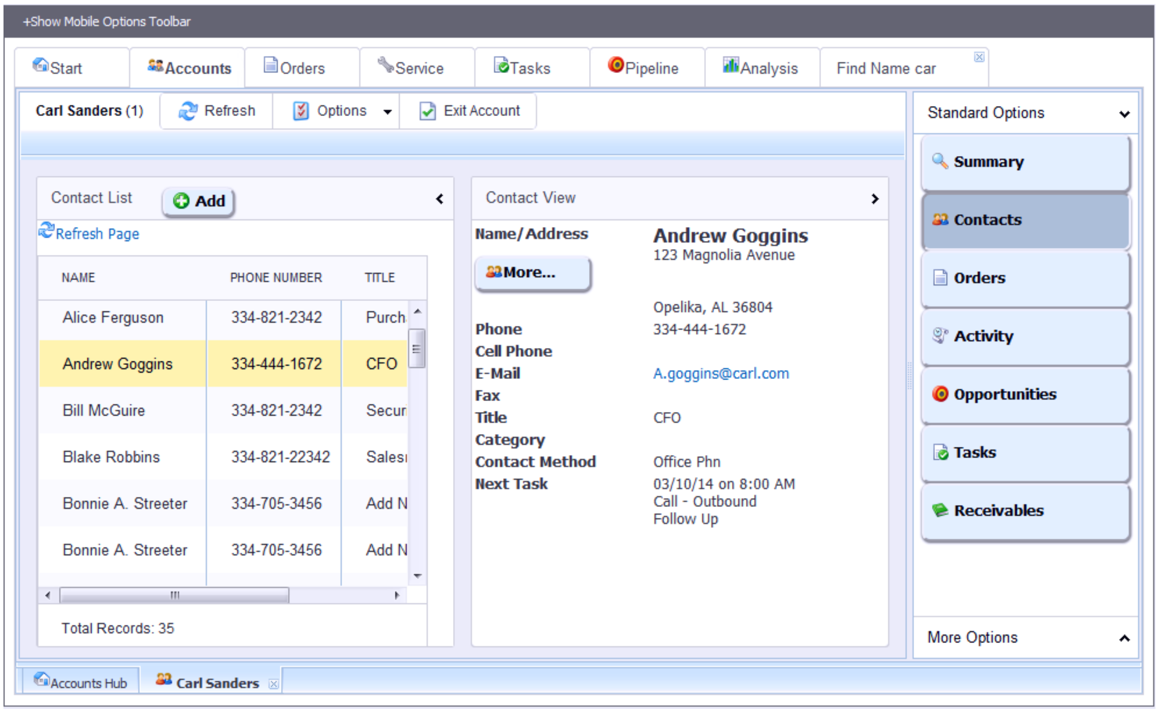
You may also press the Maps button to view the customer's address in Google Maps.



Show address in Google maps

Contacts

The Contacts page shows a list of all contact persons defined for the customer and lets you see the key info for each one as you highlight a contact in the list. Within the key info you may press the More button to zoom to the full Contact portal. You may also press the "Add" button to add a new contact.



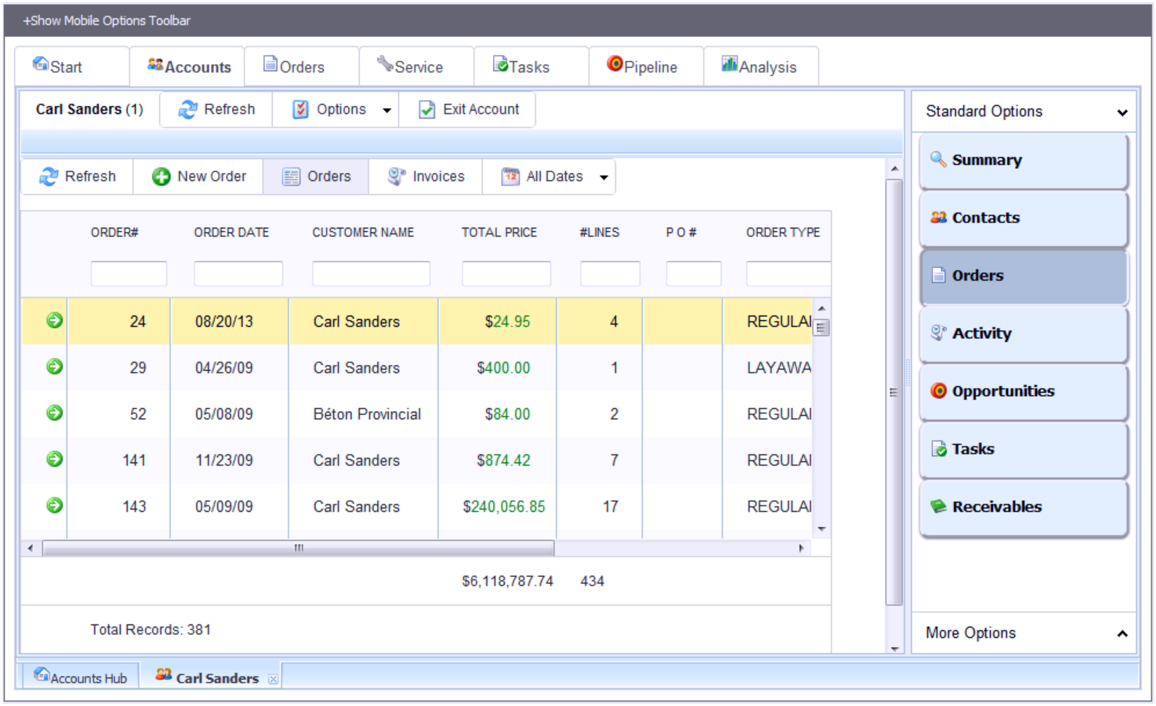
Contact List

Orders

The Orders page shows a list of orders for the customer. You may sort or filter the list using the column headings. Using the toolbar buttons you may:

- Add a new order
- View past invoices
- Select a date range for the list

Press the green arrow beside an order or invoice to zoom to the related details.

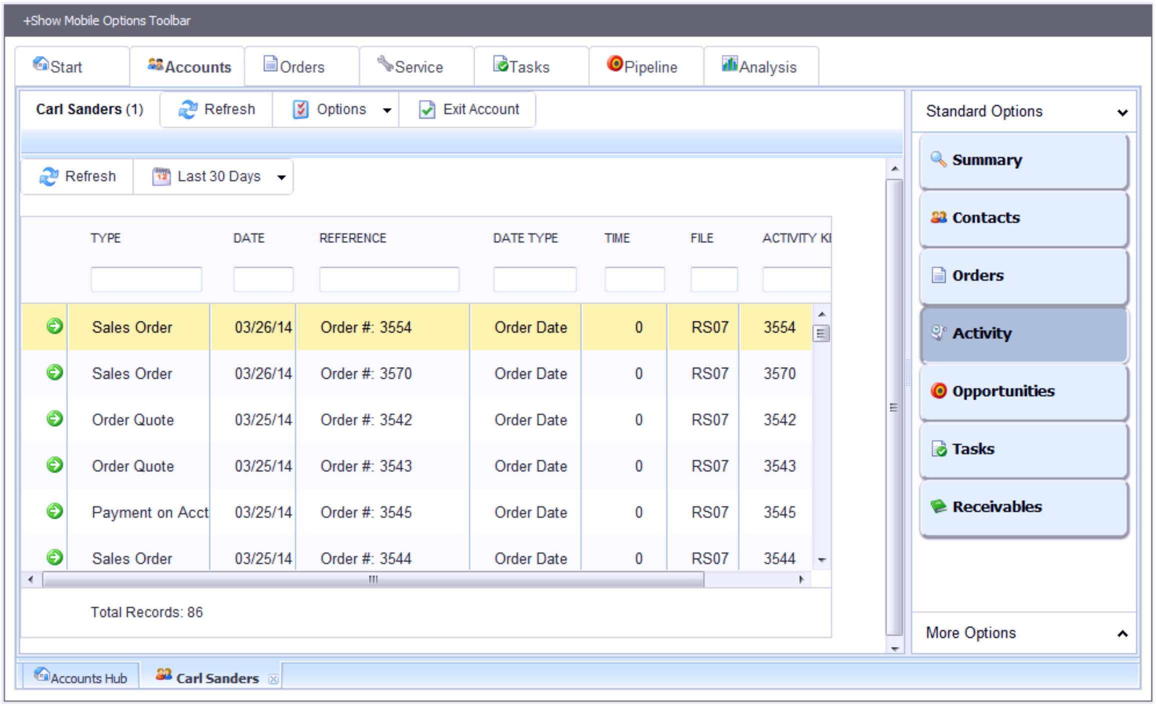


Orders Listing

Activity

The Activity page shows all recorded recent activity for this customer including tasks, orders, service orders, payments, credits, contracts, etc. You may sort or filter the list using the column headings, and you may select a date range in the toolbar.

Press the green arrow beside a record to zoom to any related details for the activity.



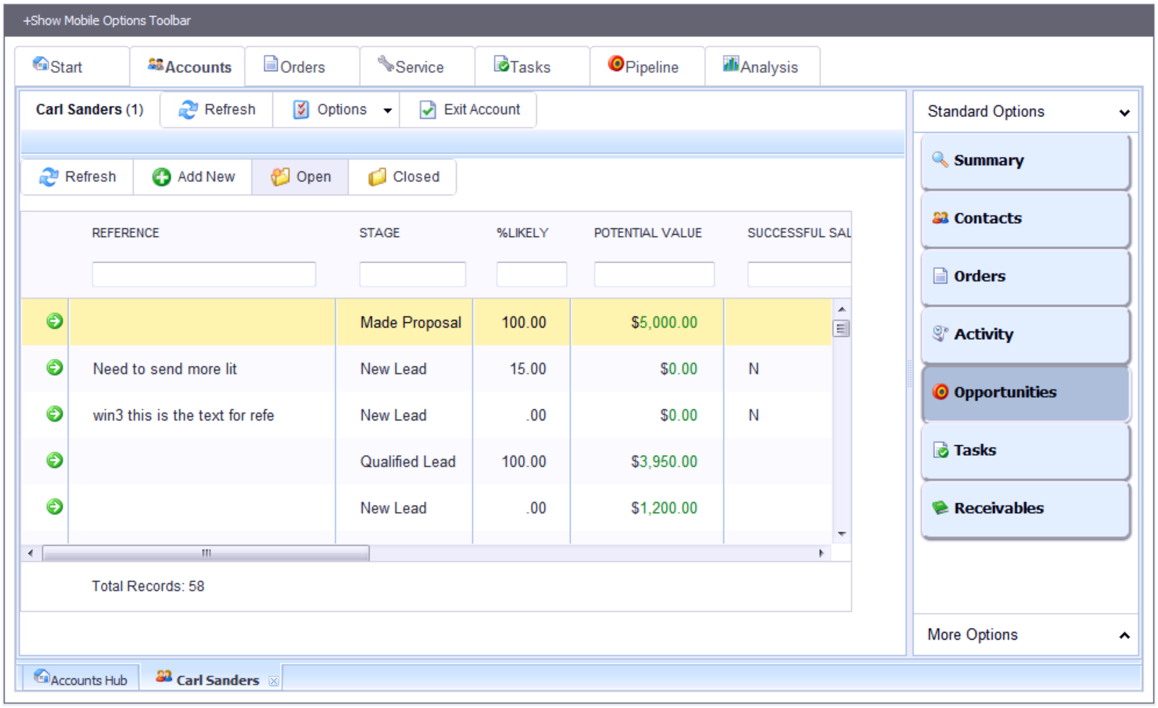
Activity Listing

Opportunities

The Opportunities page shows a list of sales opportunity tasks for this customer. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

- Add a new opportunity
- Toggle between open and closed opportunities

Press the green arrow beside a record to zoom to the details of the related opportunity.



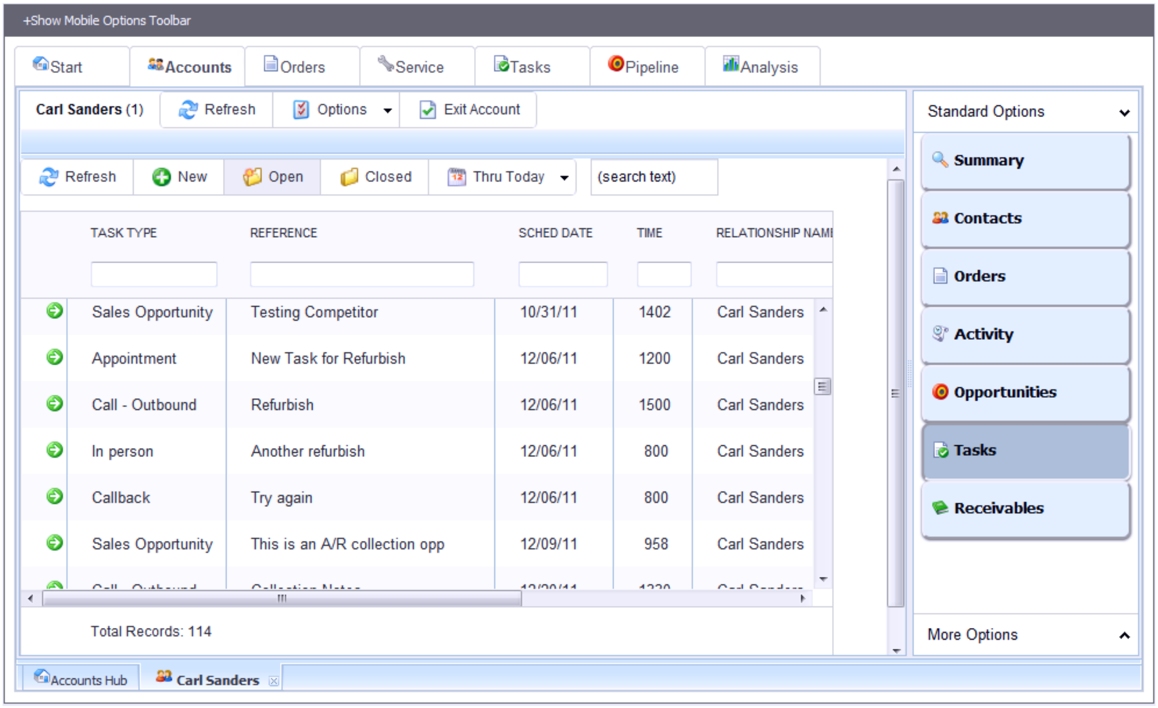
Opportunity Listing

Tasks

The Tasks page shows a list of tasks for this customer. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

- Add a new task
- Toggle between open and closed tasks
- Select a date range for the list
- Enter text to search for in the tasks. The search will include the task details and the reference field. For example, you could enter "widget" to find all tasks for the customer that included the word "widget" in the text or reference fields.

Press the green arrow beside a record to zoom to the details of the related task.

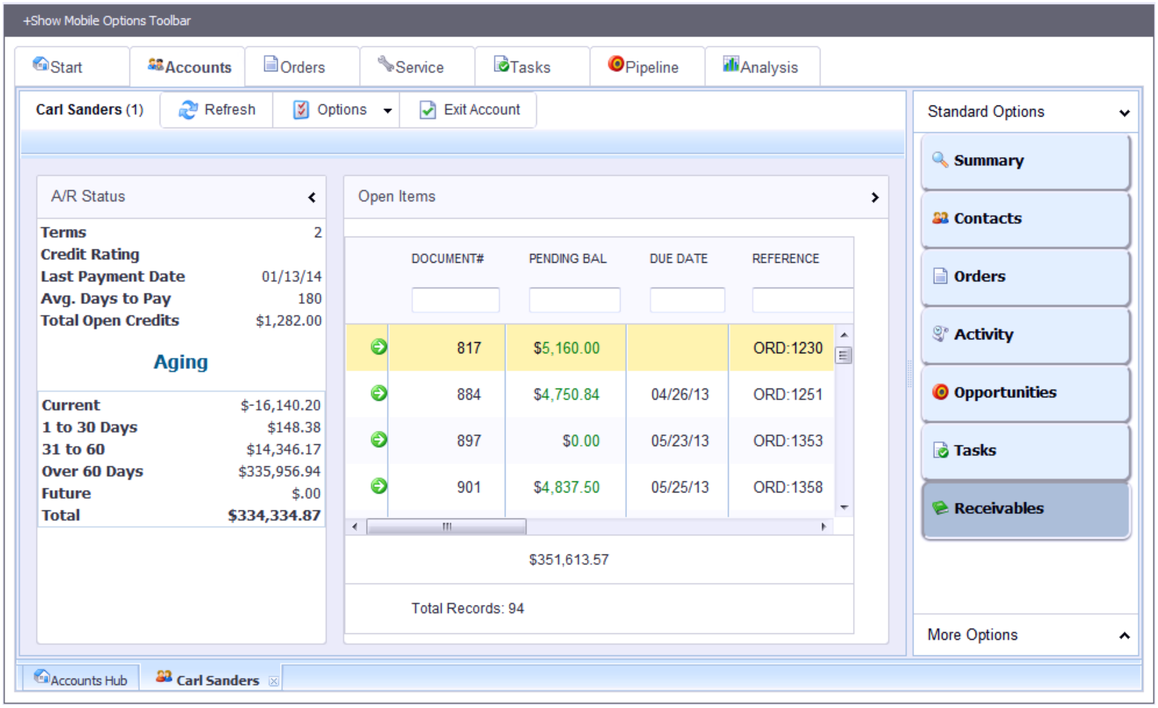


Task Listing

Receivables

The Receivables page shows unpaid balance and aging totals along with a list of all open items in Accounts Receivable for this customer. You may sort or filter the list using the column headings.

Press the green arrow beside a record to zoom to any available details such as the invoice.



Customer Receivables

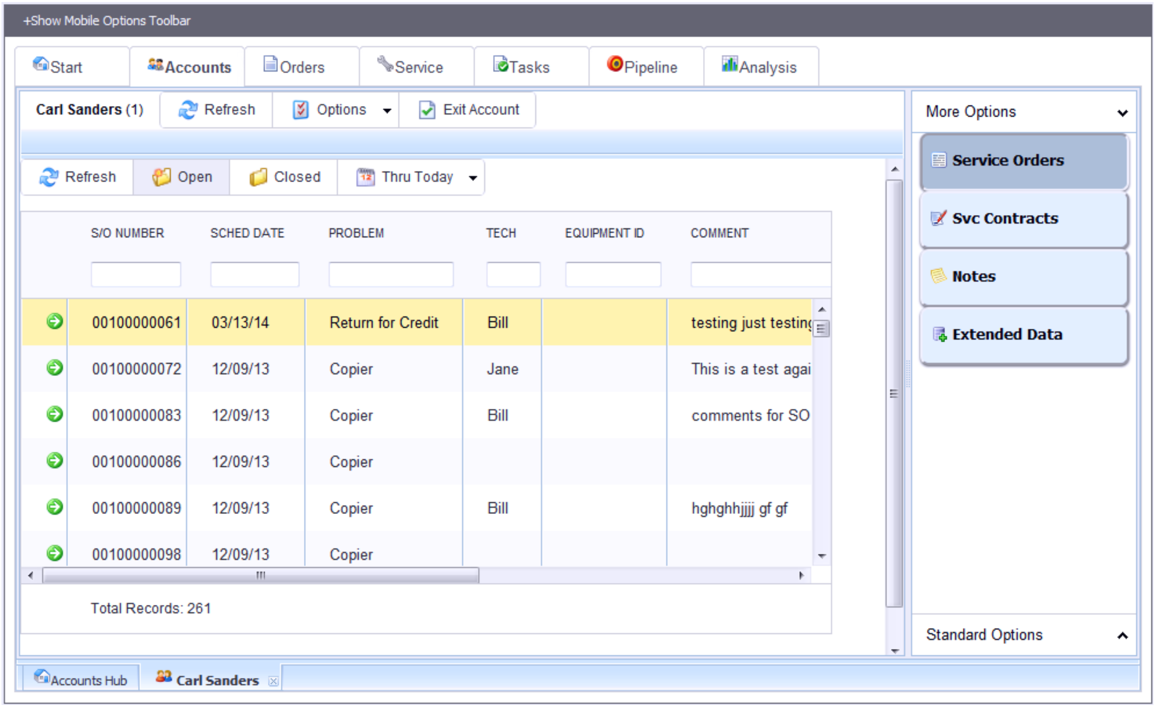
(The following options are available under the "More Options" set of buttons or the "Options" drop-down list.)

Service Orders

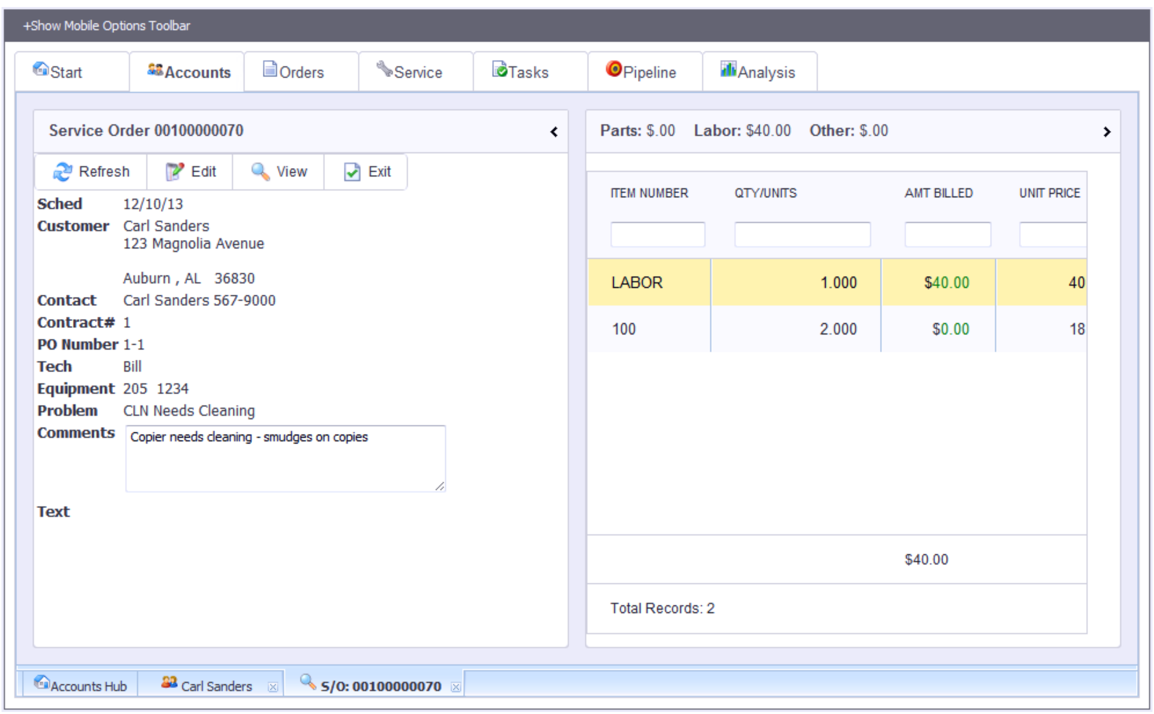
The Service Orders page shows a list of service orders for the customer. You may sort or filter the list using the column headings. Using the toolbar buttons you may:

- View open or closed service orders
- Select a date range for the list

Press the green arrow beside a service order to zoom to the related details.



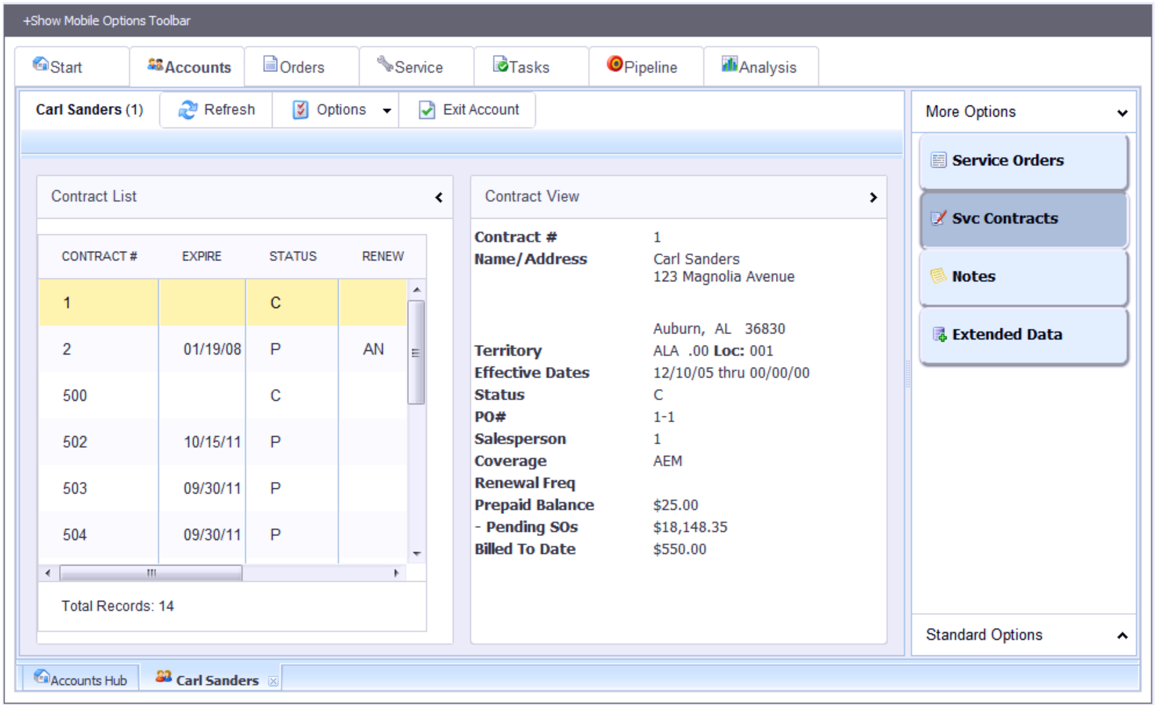
Customer Service Orders



Service Order View

Service Contracts

The Service Contracts page shows a list of all service contracts defined for the customer and lets you see the key info for each one as you highlight a contact in the list.

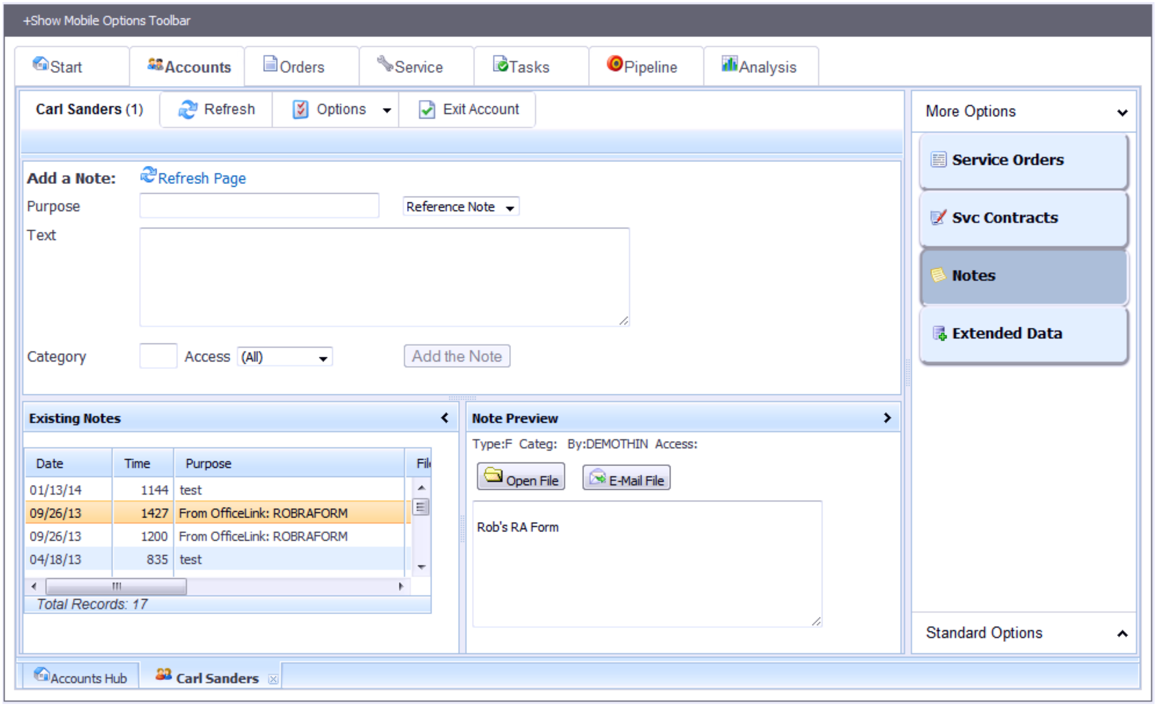


Customer Service Contracts

Notes

The Notes page shows a list of any existing notes that have been entered for the customer and lets you see the text for each one as you highlight it in the list.

You may enter a new note by filling in the form at the top of the page and pressing Add the Note.

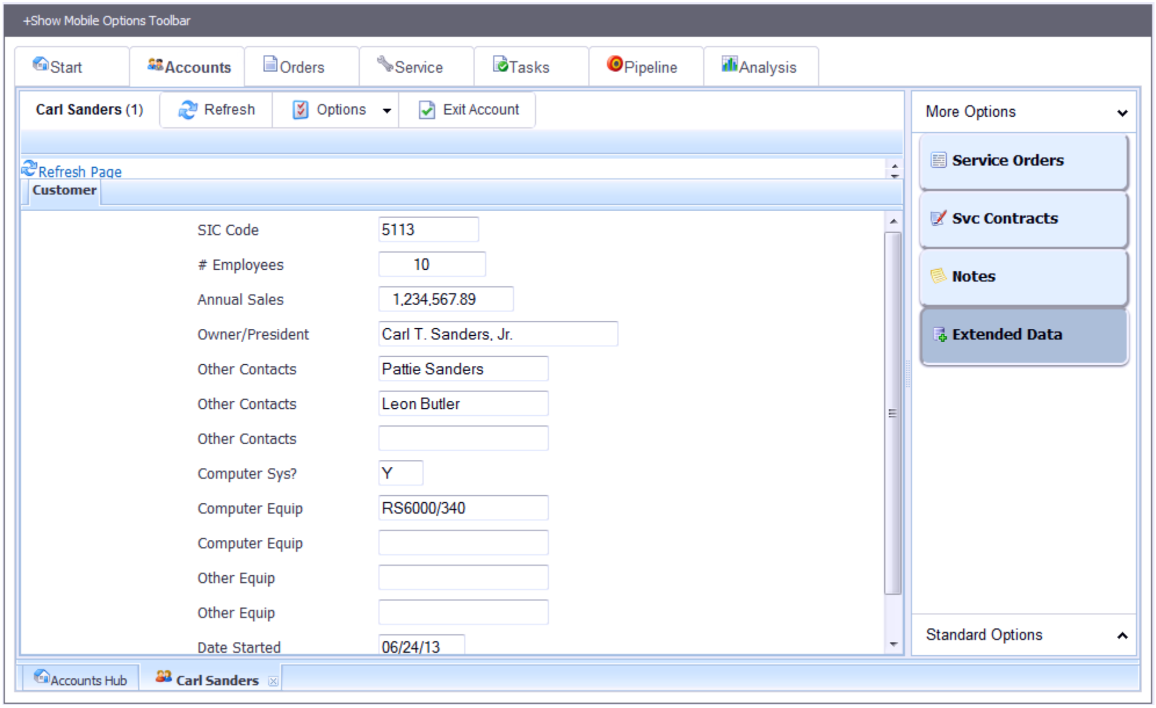


Customer Notes

Extended Data

(This option appears only if you have Extended Data defined for customers.)

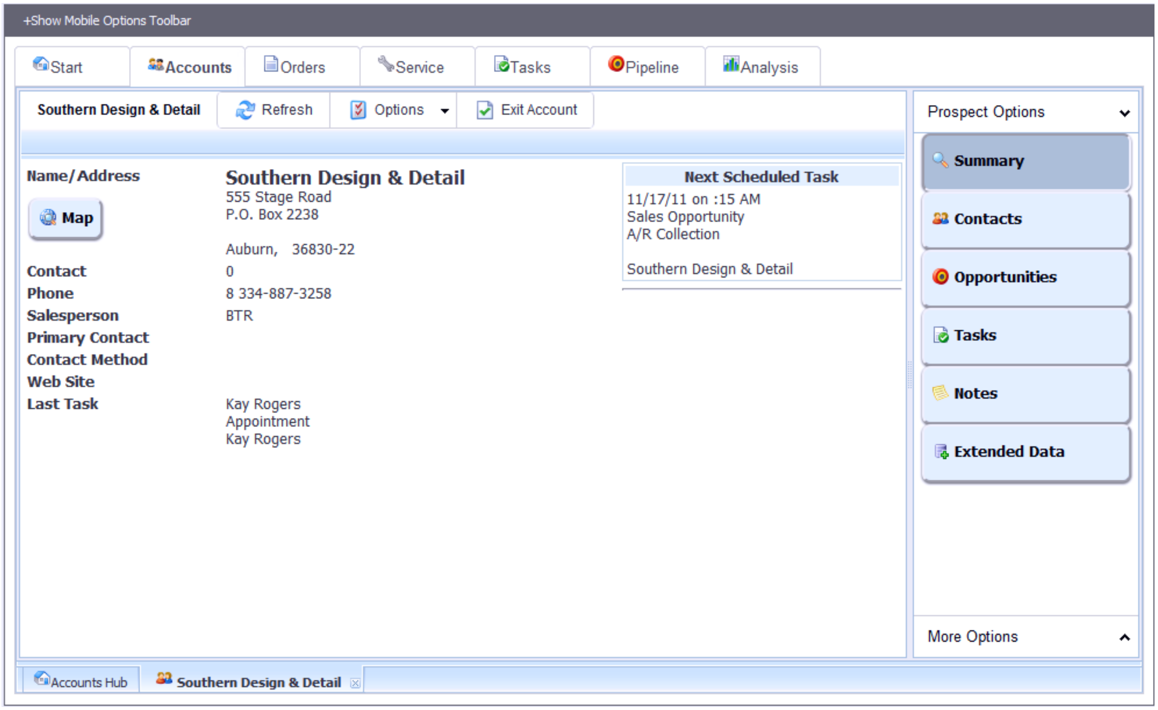
In this page you may review and edit any Extended Data fields defined for this customer. Any changes you make here are automatically updated to the records.



Customer Extended Data

Prospect Account Portal

When you zoom on a prospect (or other non-customer relationship) the relationship portal gives you quick access to available info for that relationship.



Prospect Summary

Summary Info

The Summary page shows standard info for the prospect. You may also press the Maps button to view the prospect's address in Google Maps.

Contacts

The Contacts page shows a list of all contact persons defined for the prospect and lets you see the key info for each one as you highlight a contact in the list. Within the key info you may press the More button to zoom to the full Contact portal. You may also press the "Add" button to add a new contact.

Opportunities

The Opportunities page shows a list of sales opportunity tasks for this prospect. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

- Add a new opportunity
- Toggle between open and closed opportunities

Press the green arrow beside a record to zoom to the details of the related opportunity.

Tasks

The Tasks page shows a list of tasks for this prospect. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

- Add a new task
- Toggle between open and closed tasks
- Select a date range for the list
- Enter text to search for in the tasks. The search will include the task details and the reference field. For example, you could enter "widget" to find all tasks for the prospect that included the word "widget" in the text or reference fields.

Press the green arrow beside a record to zoom to the details of the related task.

Notes

The Notes page shows a list of any existing notes that have been entered for the prospect and lets you see the text for each one as you highlight it in the list.

You may enter a new note by filling in the form at the top of the page and pressing Add the Note.

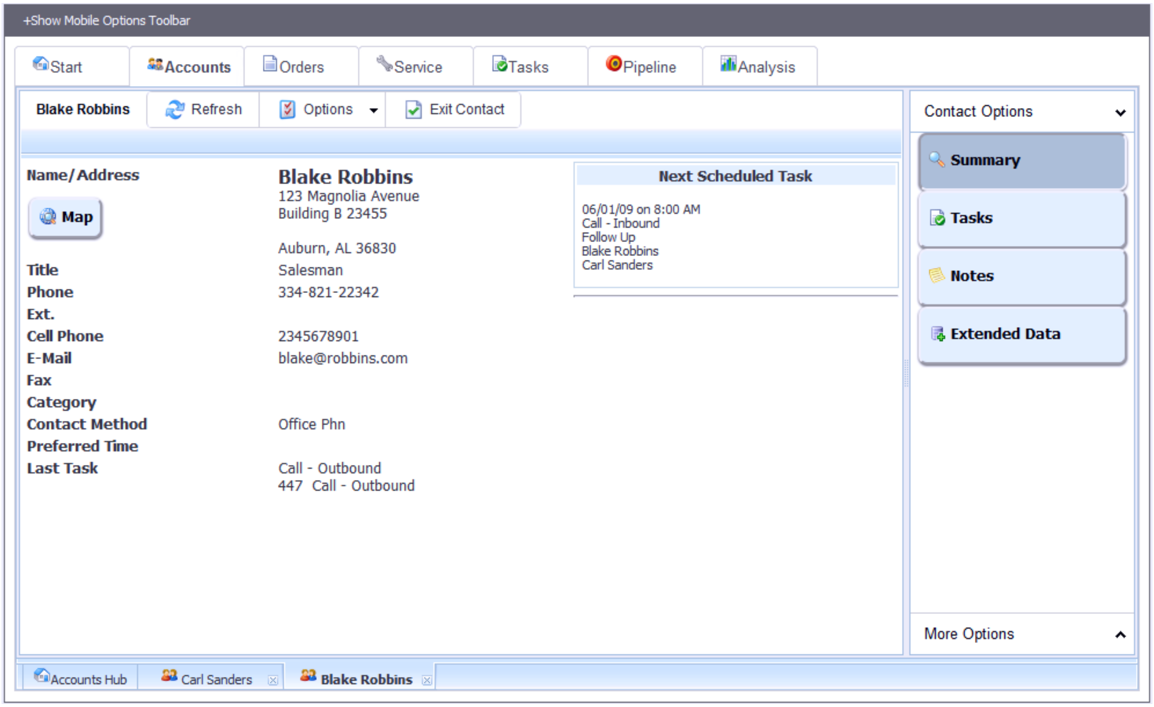
Extended Data

(This option appears only if you have Extended Data defined for prospects.)

In this page you may review and edit any Extended Data fields defined for this prospect. Any changes you make here are automatically updated to the records.

Contact Portal

When you zoom on a contact the contact portal gives you quick access to available info for that contact.



Contact Portal

Summary Info

The Summary page shows standard info for the contact. You may also press the Maps button to view the contact's address in Google Maps.

Tasks

The Tasks page shows a list of tasks for this contact. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

- Add a new task
- Toggle between open and closed tasks
- Select a date range for the list
- Enter text to search for in the tasks. The search will include the task details and the reference field. For example, you could enter "widget" to find all tasks for the contact that included the word "widget" in the text or reference fields.

Press the green arrow beside a record to zoom to the details of the related task.

Notes

The Notes page shows a list of any existing notes that have been entered for the contact and lets you see the text for each one as you highlight it in the list.

You may enter a new note by filling in the form at the top of the page and pressing Add the Note.

Extended Data

(This option appears only if you have Extended Data defined for contacts.)

In this page you may review and edit any Extended Data fields defined for this contact. Any changes you make here are automatically updated to the records.

Orders Tab

The Orders Tab provides access to sales orders and related order information.

Navigation within the Orders Tab

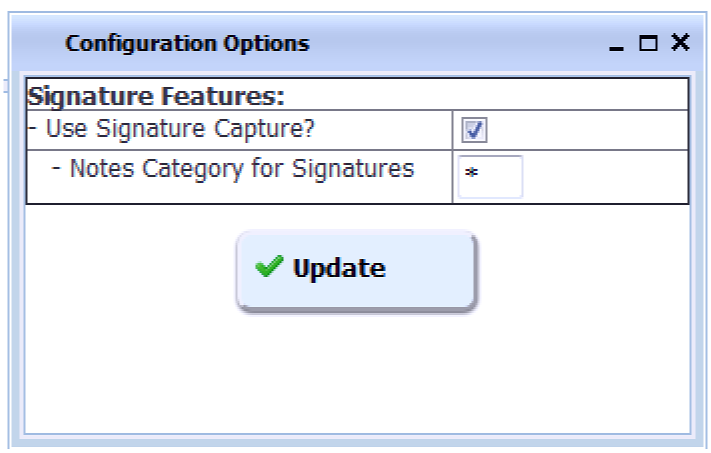
You may use any of the following methods to access the Orders pages:

- Buttons
  - The buttons that appear to the side of the page are typically the easiest method to switch between pages. These buttons may appear on the left or the right of the page as configured in the “Options” button of the SouthWare Mobile Hub page.
  - You may choose to hide these buttons via the Options button of the toolbar.
- Dropdown Selections
  - The pages are also accessible from the dropdown “Options” button in the toolbar.

Configuration Options

From the Options toolbar there is a “Configure” option. At the time of this writing the Order-related options included:

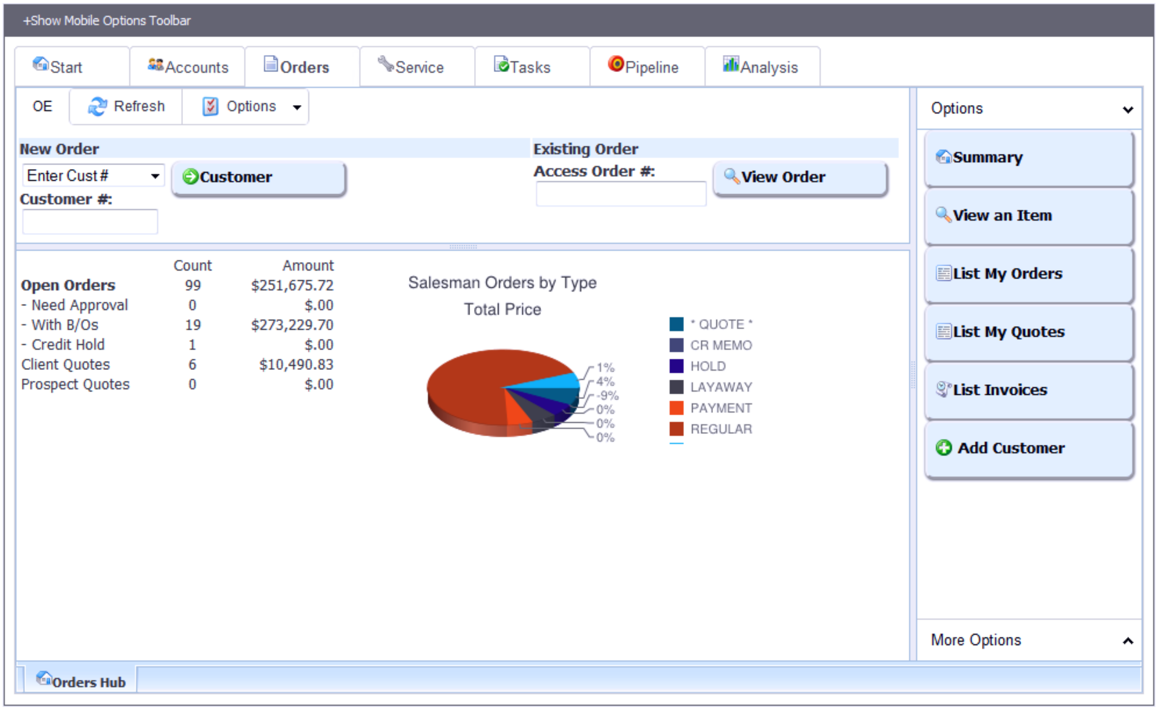
- **Use Signature Capture?**
  This will enable/hide the order signature button.
- **Notes Category for Stored Signatures**
  Signature data is stored as notes attached to orders. You must have a unique notes category to distinguish signature notes from other orders. By default this category is “*”.



Summary

The Summary page provides an Orders overview and contains the following sections:

- Status Info – shows some totals and info about your accounts
- Option to create a New Order
- Option to View an Existing Order



Orders Summary

View an Item

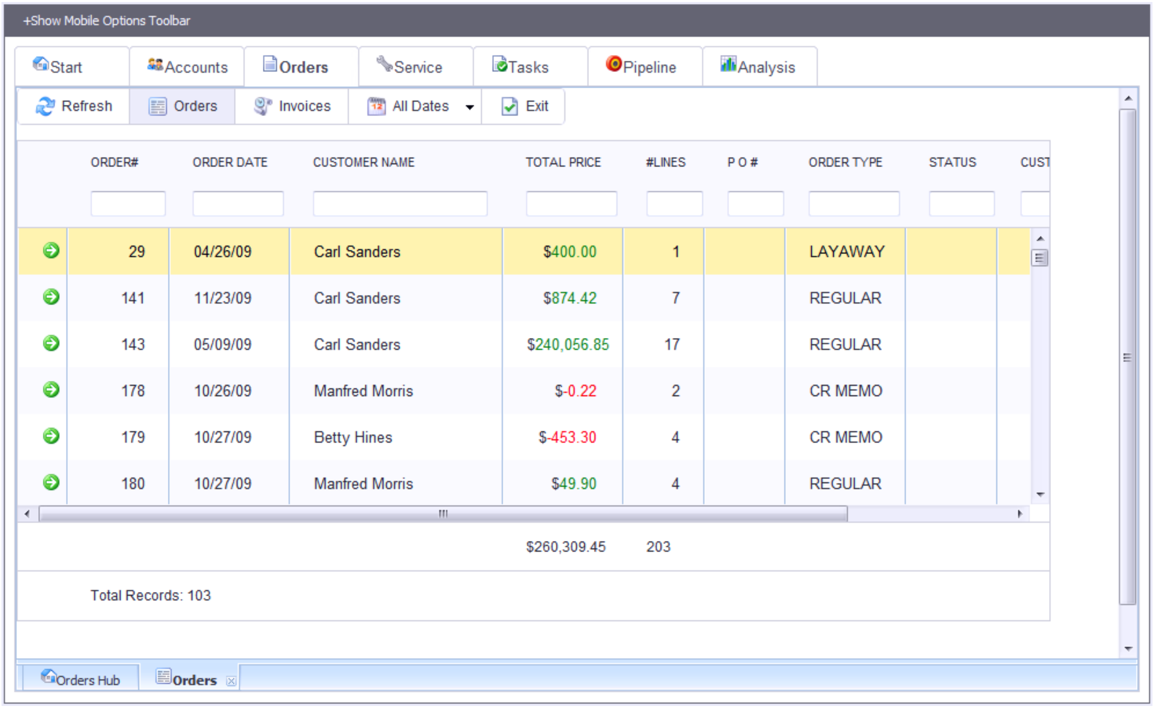
This function lets you enter a stock number and display info for that item. This provides a quick lookup if you need to check on availability or pricing of an item.

List My Orders

This function displays a full-width list of all orders assigned to your salesperson code . You may sort or filter the list using the column headings. Using the toolbar buttons you may:

- Add a new order
- View past invoices
- Select a date range for the list

Press the green arrow beside an order or invoice to zoom to the related details.



Order Listing

List My Quotes

This function is the same as the Order Listing except that it includes only Quote-type orders.

List Invoices

This function lists invoices for your salesperson code and for any salesperson group of which you are a member. Press the green arrow beside an invoice to zoom to the related details.

Add Customer

(This option appears only if your Order Entry operator options allow you to add customers.)

This function displays a window and allows you to add a new customer record. This will also create the corresponding relationship and contact records in TaskWise.

Access an Existing Order

You may access an existing order by entering the order number in the "Access Order #" field and pressing the "View Order" button. You may also use the List options to display an existing order and then zoom to the Order Entry Portal for the order.

Add a New Order

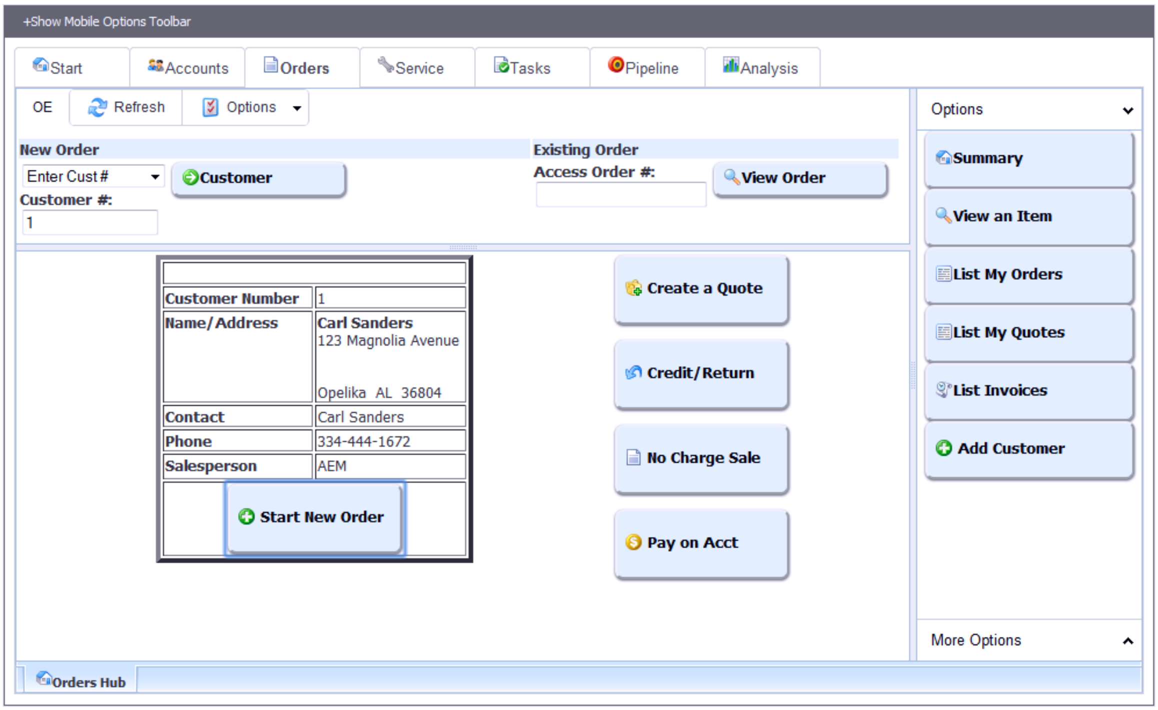
To add a new order you first identify the customer for the order. The "New Order" options include:

- Enter Customer Number

- Find by Customer Name
- Find by Customer Phone Number
- Find by Customer Address

If you enter the customer number the customer info displays on the screen and gives you the option to start a new order. If you use one of the find function you will see a list of matching customers, and when you select one you will see the options to start a new order for the customer.

New Order Types



Start a new order

After you have identified the customer you may press the button for any of the following order types:

- New Order (Regular Order) – this is the default
- Create a Quote – start a new quote for this customer
- Credit/Return – start a new credit memo for this customer – you will then have the option to enter or select an invoice to credit or create an unapplied credit
- No Charge Sale – start a new No Charge sale
- Pay on Account – start a new payment transaction

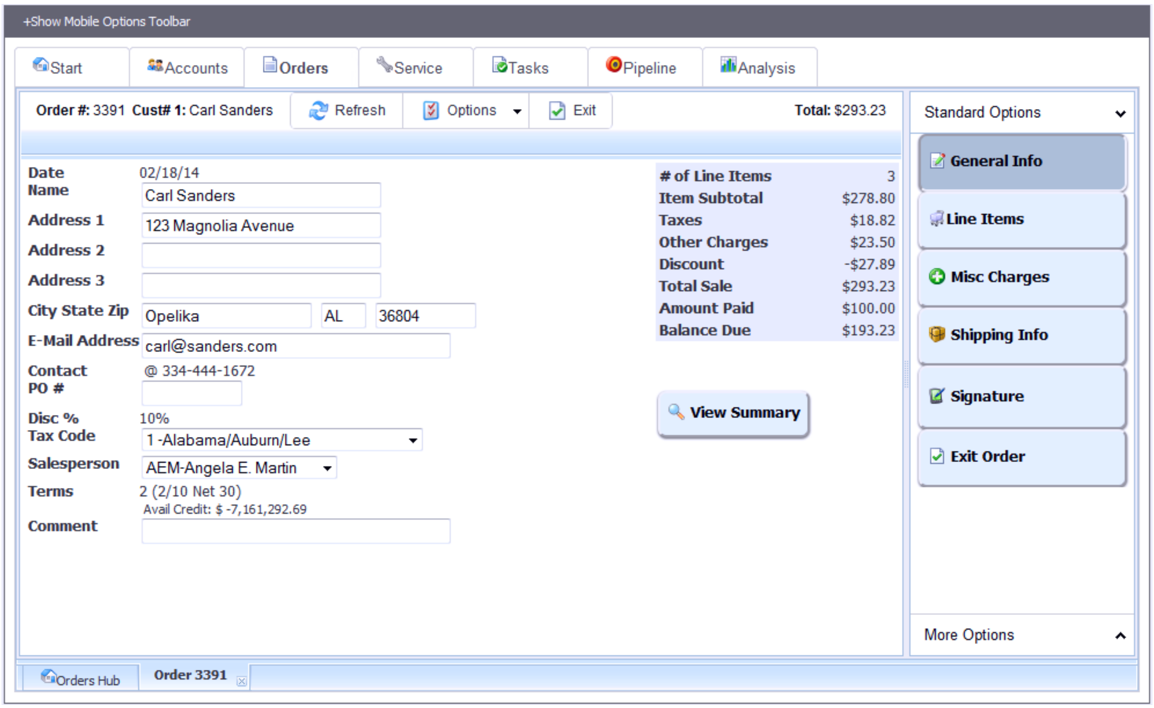
After you select the order type the new order is automatically created and the Order Entry Portal is displayed for the new order.

Order Entry Portal

This portal allows you to edit new and existing sales orders. The portal is organized into several pages for easy access to all related data.

General Info

This page shows header information for the order including order totals. If you make changes to fields on this page they are automatically updated in the order.



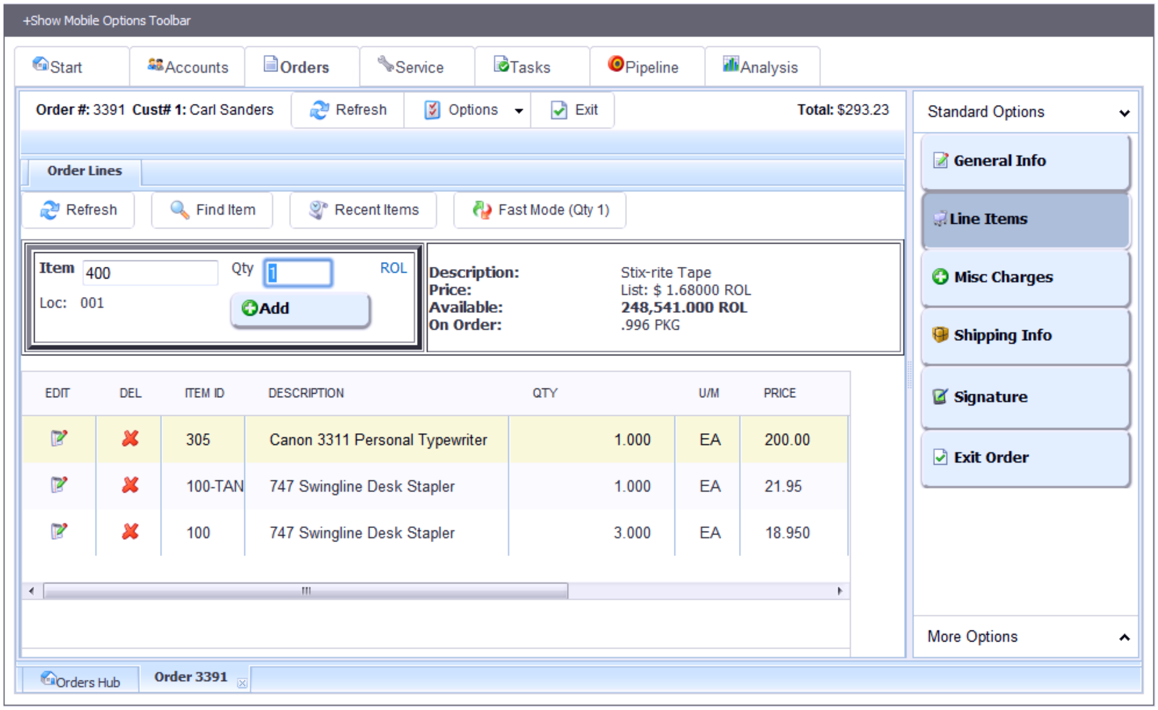
General Order Info

Line Items

The Line Items page has numerous functions to allow you to add, edit, and delete line items from the order. Any existing line items are shown in a grid on this page.

To Enter an Item Number

If you know the stock number you enter it in the Item field, specify a quantity, and press Add.



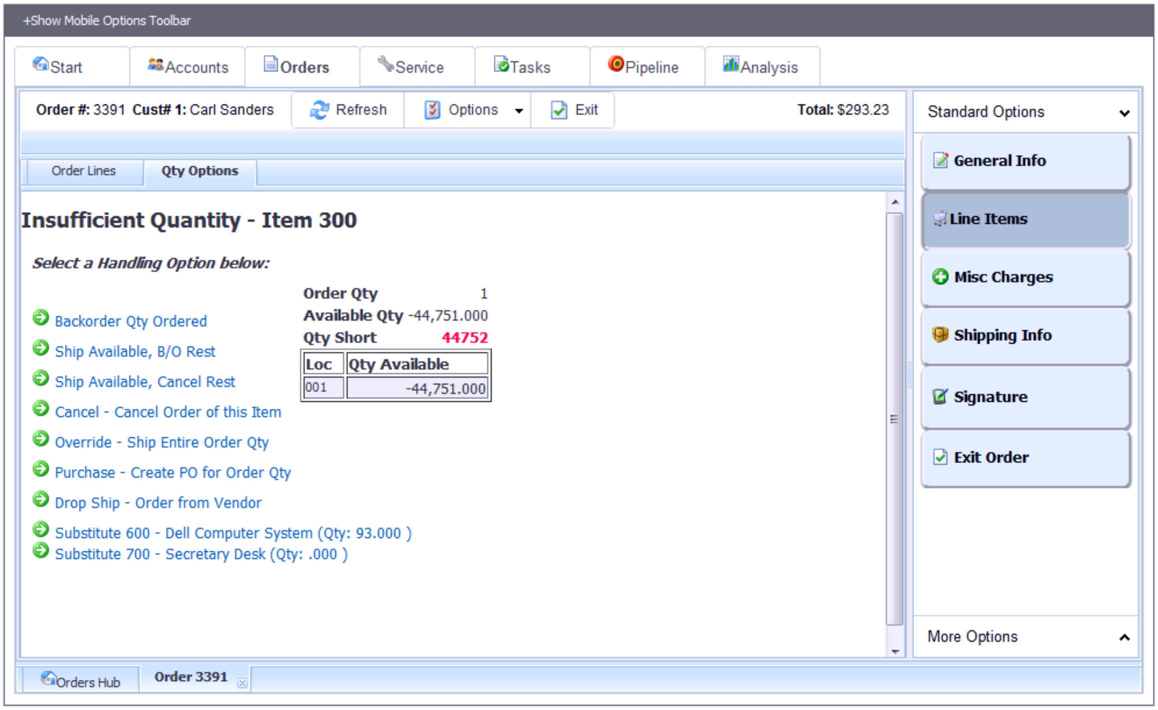
Enter Stock Number to Add

Fast Mode Option

The toolbar includes a Fast Mode option. If this is toggled on then the quantity for an item will automatically default to 1 and the line item will be added as soon as you enter the item number. If you toggle this option OFF then you must enter a quantity before adding the line item.

Insufficient Quantity Options

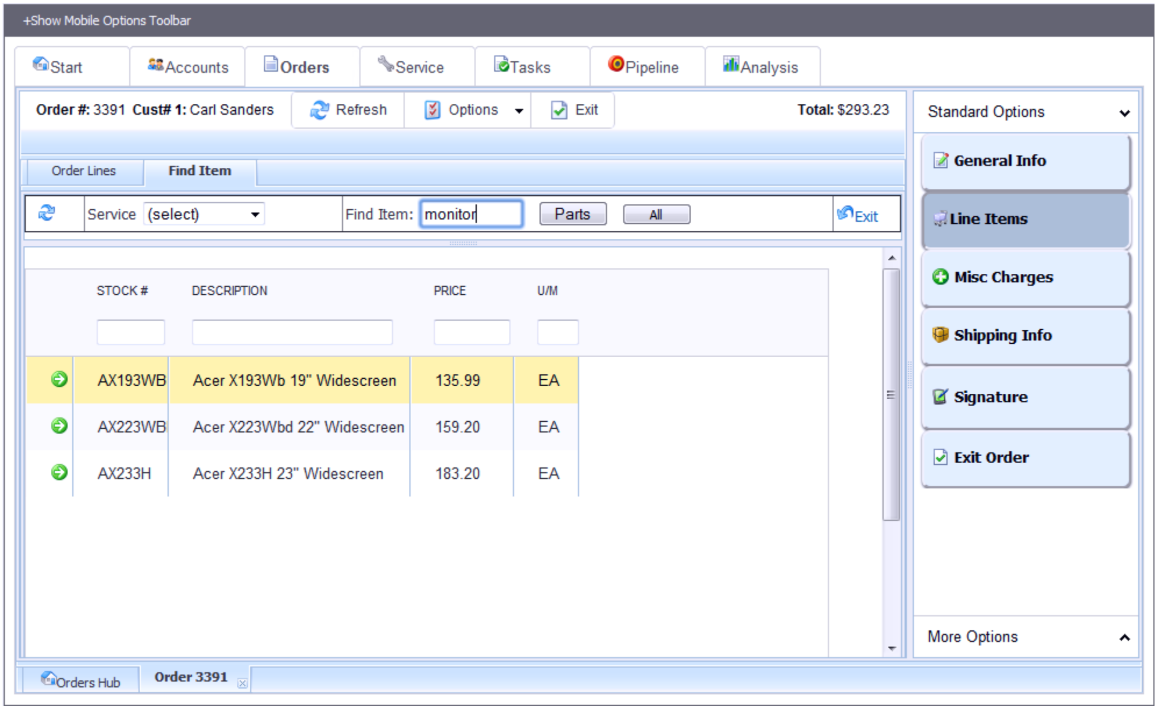
If there is not sufficient quantity available for an item the Quantity Options page will display. Here you may choose an option to backorder, purchase, cancel, etc. depending on your operator options and any available substitutes.



Insufficient Quantity Options

To Find an Item

To find an item you may press the Find Item button in the toolbar to display the Find Item page. This lets you find a service code (if applicable), a part by key word, or search all types of items via the All button. Press the green button beside an item to select it for the order.



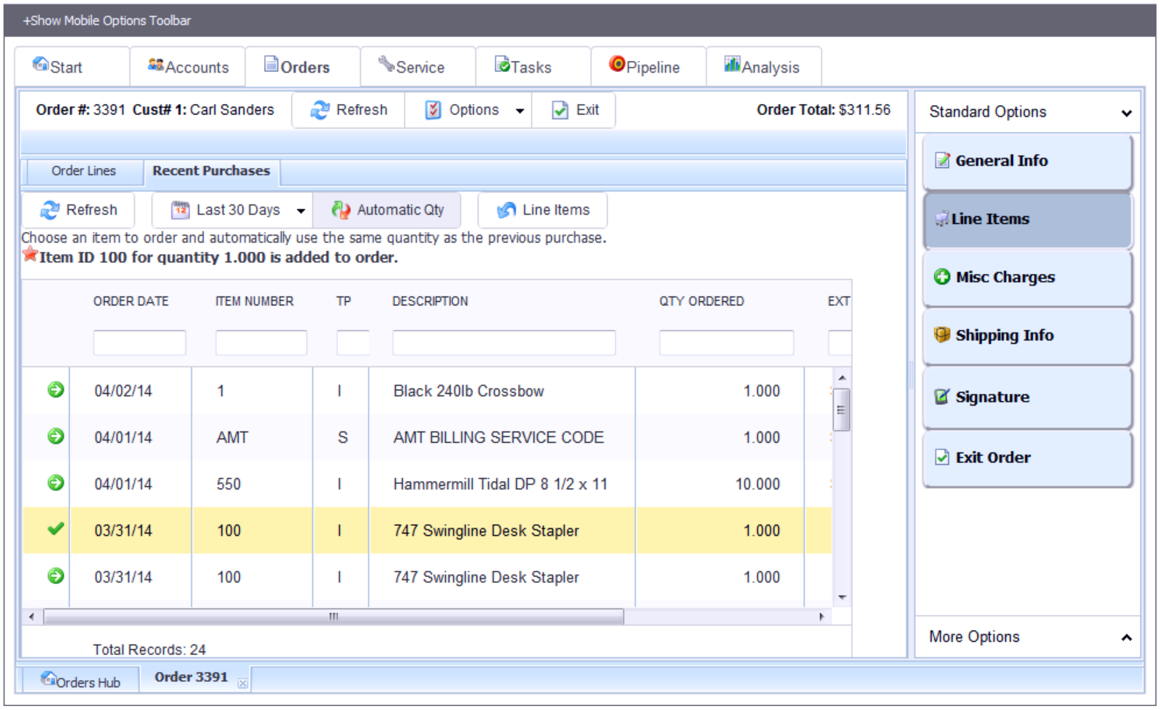
Find Parts

To Review/Select Recent Purchases for this Customer

Press the Recent Items button in the toolbar to display a list of items recently purchased by this customer. Press the green arrow beside an item to select it for this order. A confirmation message shows that the line item has been added (if using Automatic Quantity) and the green arrow changes to a checkmark to show the item was selected.

Toolbar options include:

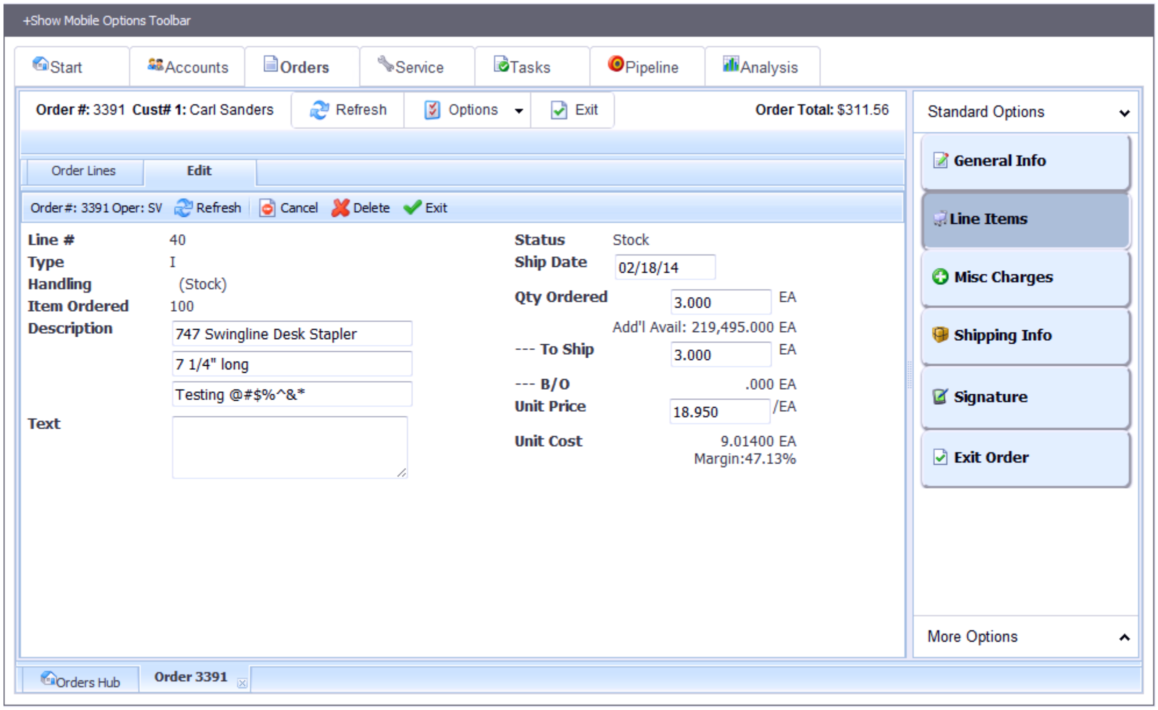
- Date range - By default the list shows items from the last 30 days, but you may select a longer time period
- Automatic Quantity – By default this option is ON, which means the line item will automatically be created using the same quantity as the recent item you select. You may toggle this option off in order to review/edit the quantity before adding the line item.



Select from Recent Purchases

To Edit a Line Item

You may click on the Edit button beside a line item to edit the line item information. This displays the edit page. You may change these fields as needed, then exit the page. When you change a field it is instantly updated in the order. You may also choose to cancel or delete the line item from the edit page.



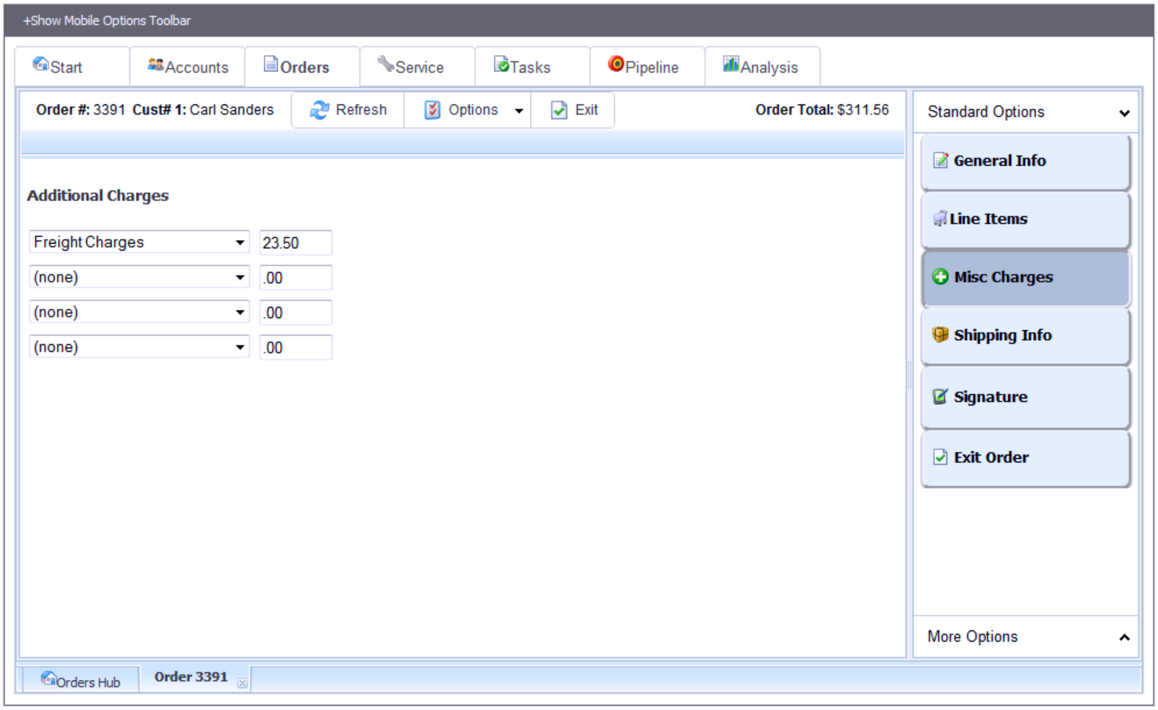
Edit a Line Item

To Delete a Line Item

You may click on the Delete button beside a line item to delete the line from the order.

Misc Charges

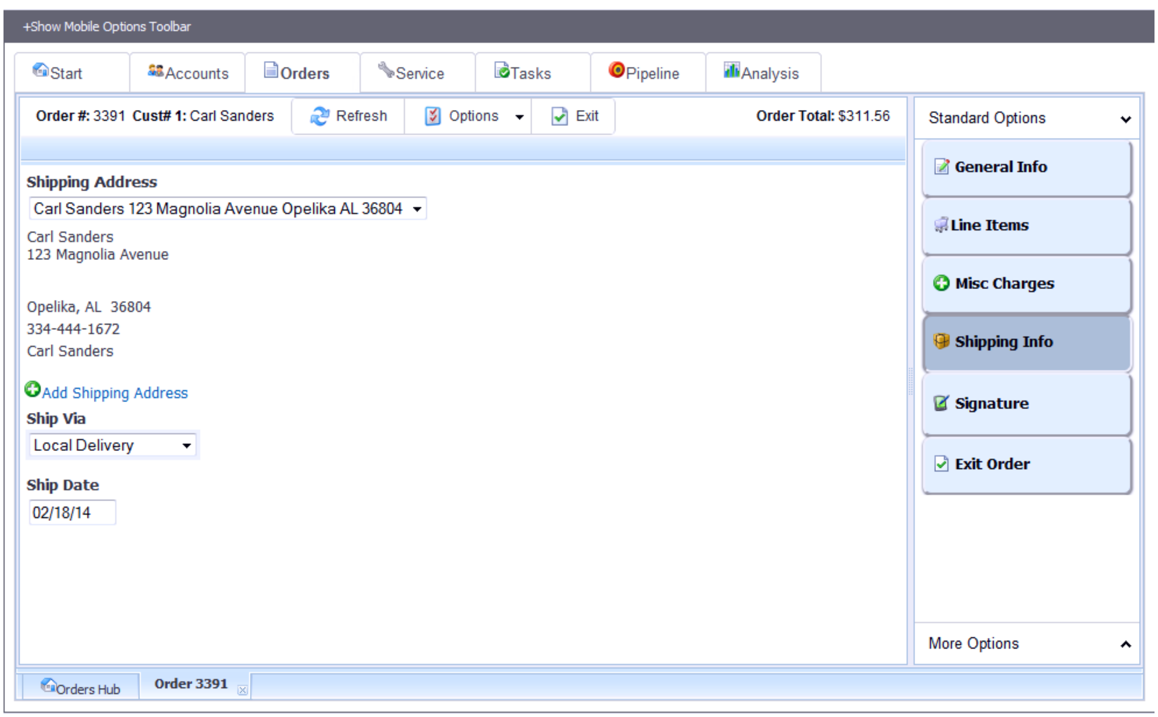
The Miscellaneous Charges page lets you define up to four miscellaneous charge codes and amounts for the order. As you add or change these fields they are instantly updated in the order.



Miscellaneous Charges

Shipping Info

The Shipping Info page lets you view and edit the shipping info for the order. Any changes you make are instantly updated to the order.



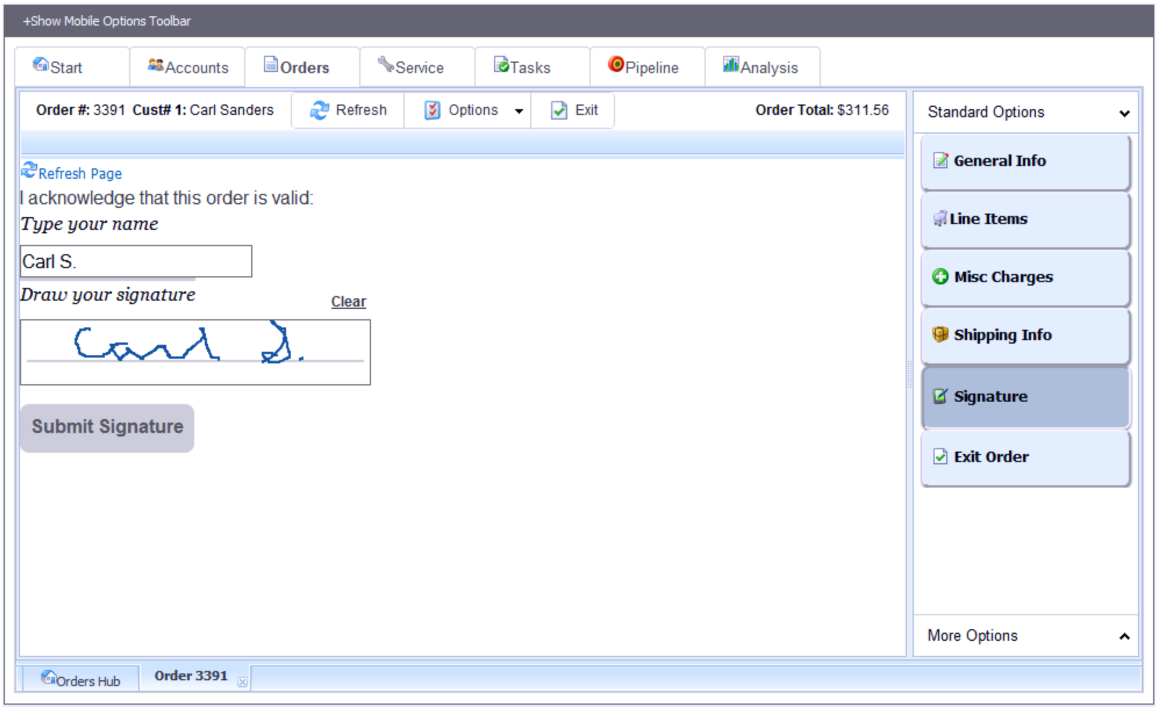
Shipping Info

Signature

(This option appears only if you activate it via the Configuration Options available in the dropdown Options of the Orders Tab Summary page.)

The Signature page allows you to capture a signature from the customer showing acceptance of the order. This is optional.

The customer must both type a name and draw a signature. When submitted this info is digitally stored in a note for the service order. The sales order View Summary page shows the last signature submitted for the order (see "View Order Summary Page" later in this document).



Signature Info

Exit Order

This button closes the order and returns to the previous page.

(The following options are available under the "More Options" set of buttons or the "Options" drop-down list.)

Enter Payment

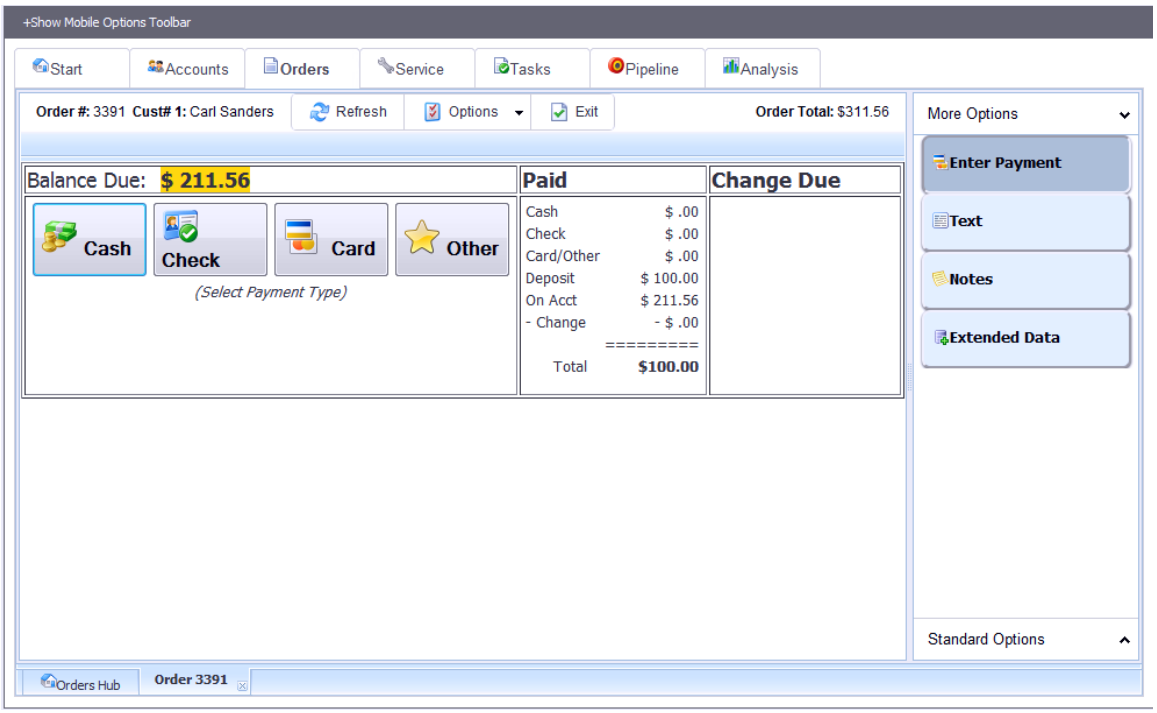
The Payment page allows you accept customer payment on the order. It also displays any deposits already received.

Here are the possible payment types:

- Cash – Enter the cash amount received.

- Check – Enter the check number and amount.
- Card – Enter the amount and then use the card interface to process the card received.
- Other – Enter the other code and amount.

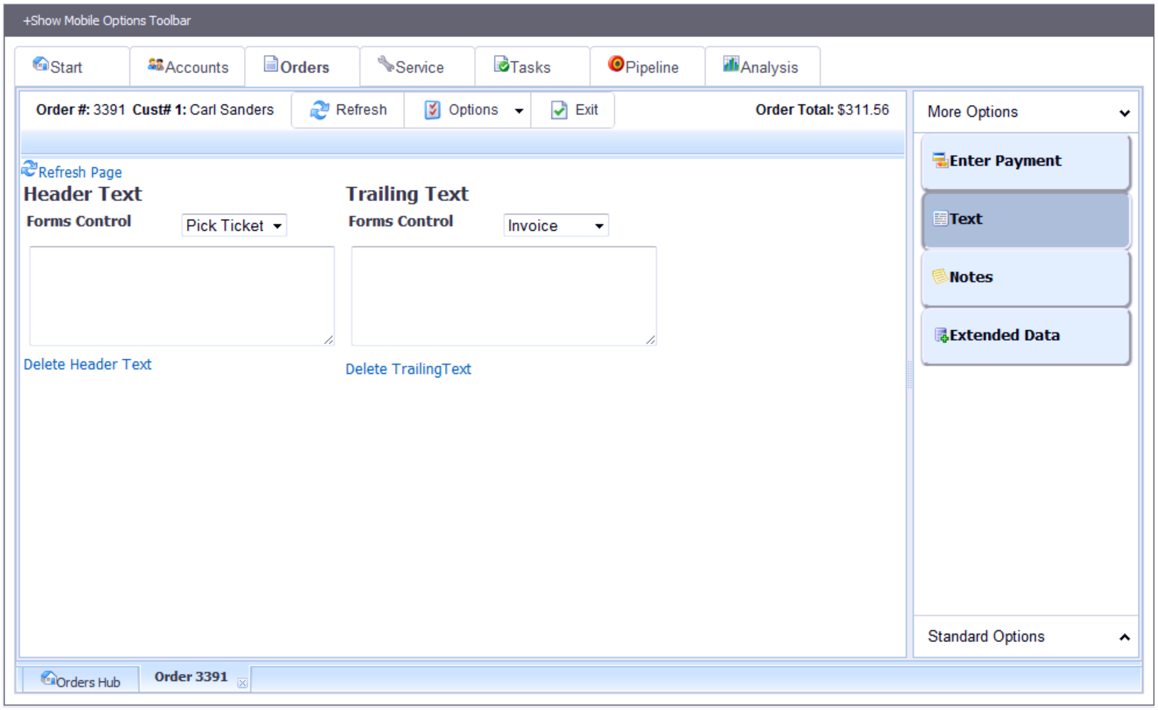
After you enter a payment this page is refreshed to reflect the new totals.



Payment Info

Text

This page allows you to view and edit both the header text and the trailing text for the order. You may also choose which forms print the text. The text is automatically updated in the order when you change it and exit the field.

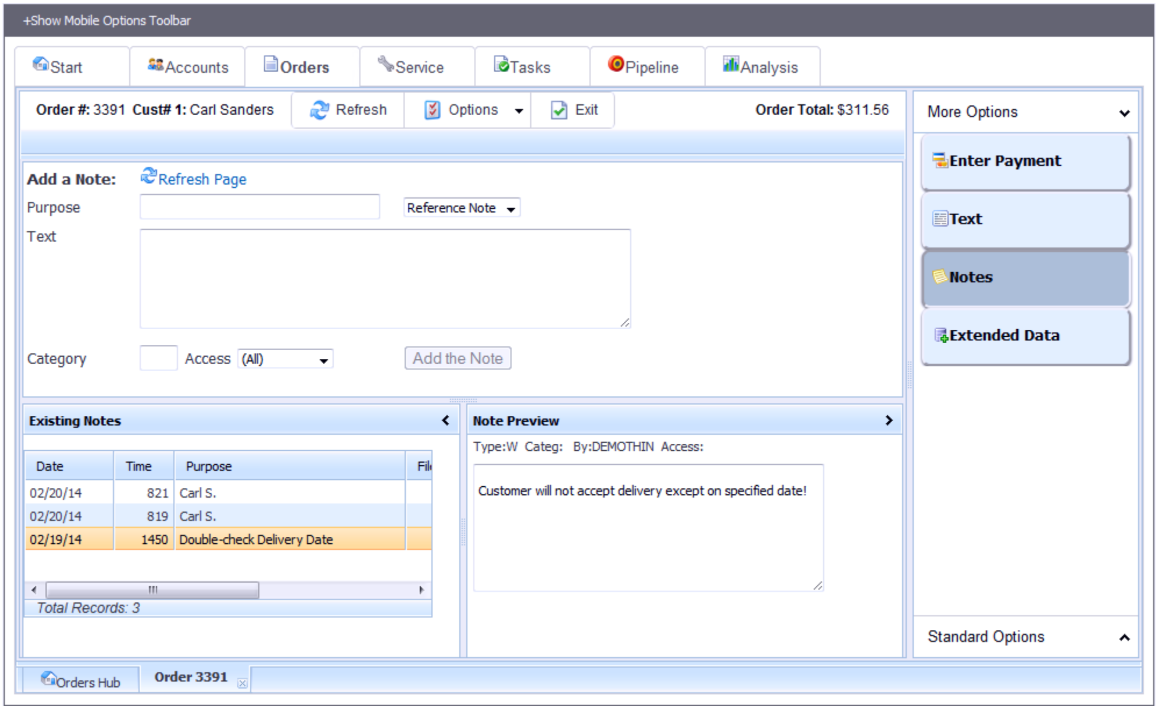


Text Page

Notes

The Notes page shows a list of any existing notes that have been entered for the order and lets you see the text for each one as you highlight it in the list.

You may enter a new note by filling in the form at the top of the page and pressing Add the Note.

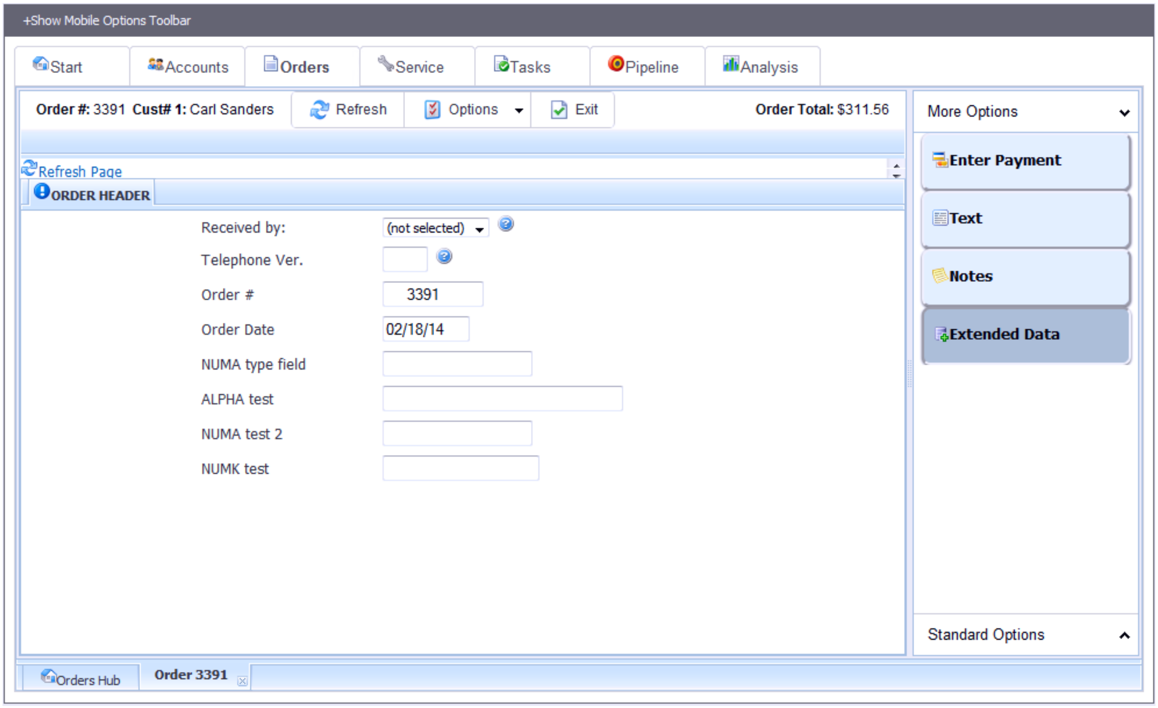


Notes

Extended Data

(This option appears only if you have Extended Data defined for sales orders.)

In this page you may review and edit any Extended Data fields defined for sales orders. Any changes you make here are automatically updated to the records.



Extended Data

View Order Summary Page

This feature opens a new browser window with a summary page showing sales order info. The page is opened in a new window for review and/or printing. If you have a printer available you may use your browser's print function to print this page. A print button appears at the top of the page, and this button is hidden from the page during printing.

The summary shows all line items along with totals and other general info. If you are capturing signatures the page will also show the last signature captured.

Summary - Order # 3391

02/20/14 08:21:55

SouthWare Rev15 Demo Company
P. O. BOX 3040
Auburn, AL 36830
334-821-1108

Order Date	02/18/14	**Ship Date**	02/18/14
Bill To	Carl Sanders (#1) 123 Magnolia Avenue Opelika, AL 36804	**Ship To**	Carl Sanders 123 Magnolia Avenue Opelika, AL 36804
PO #		**Ship Via**	Local Delivery

Item ID	Description	Order Qty	Unit Price	U/M	Amount
305	Canon 3311 Personal Typewriter	1.000	200.00	EA	200.00
100-TAN	747 Swingline Desk Stapler	1.000	21.95	EA	21.95
100	747 Swingline Desk Stapler	3.000	18.950	EA	56.85

Subtotal	$278.80
Discount	$27.89
Freight	$23.50
Other Charges	$.00
Taxes	$18.82
Payments	$.00
Balance Due	$293.23
	2/10 Net 30

Signed By: **Carl S.**

Carl S.

This is not an invoice. This information is provided for review purposes only.

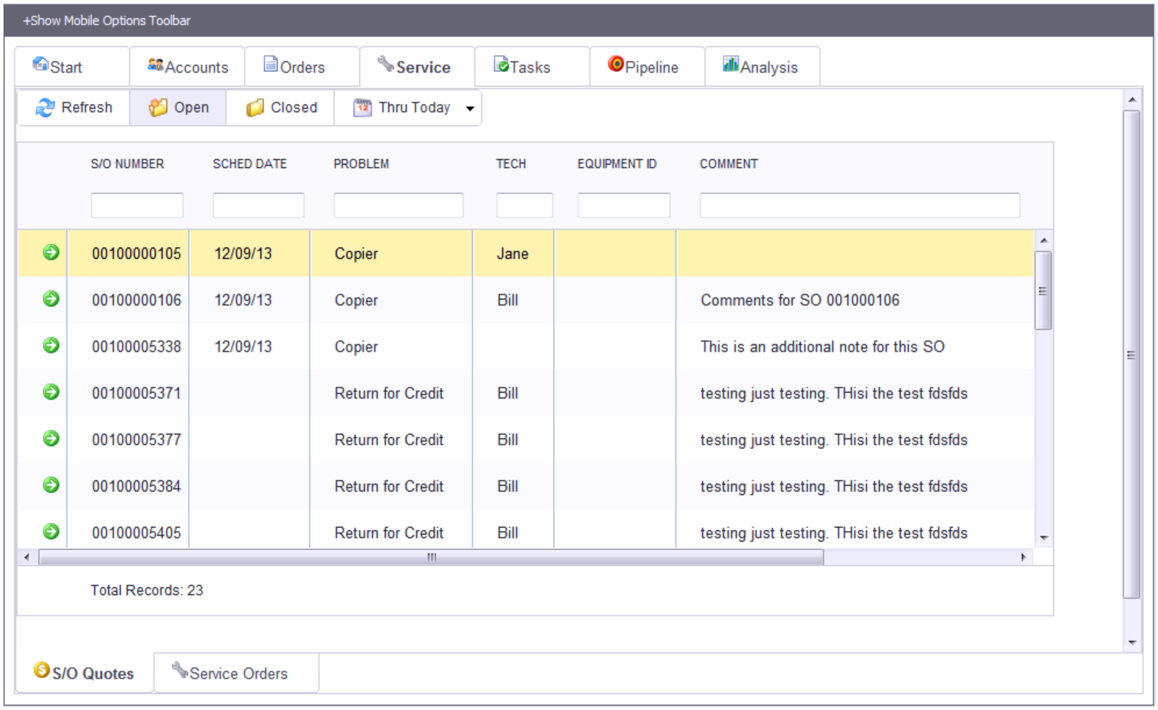
Order View Summary

Service Tab

The Service Tab page shows a list of service orders for customers available to your salesperson code. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

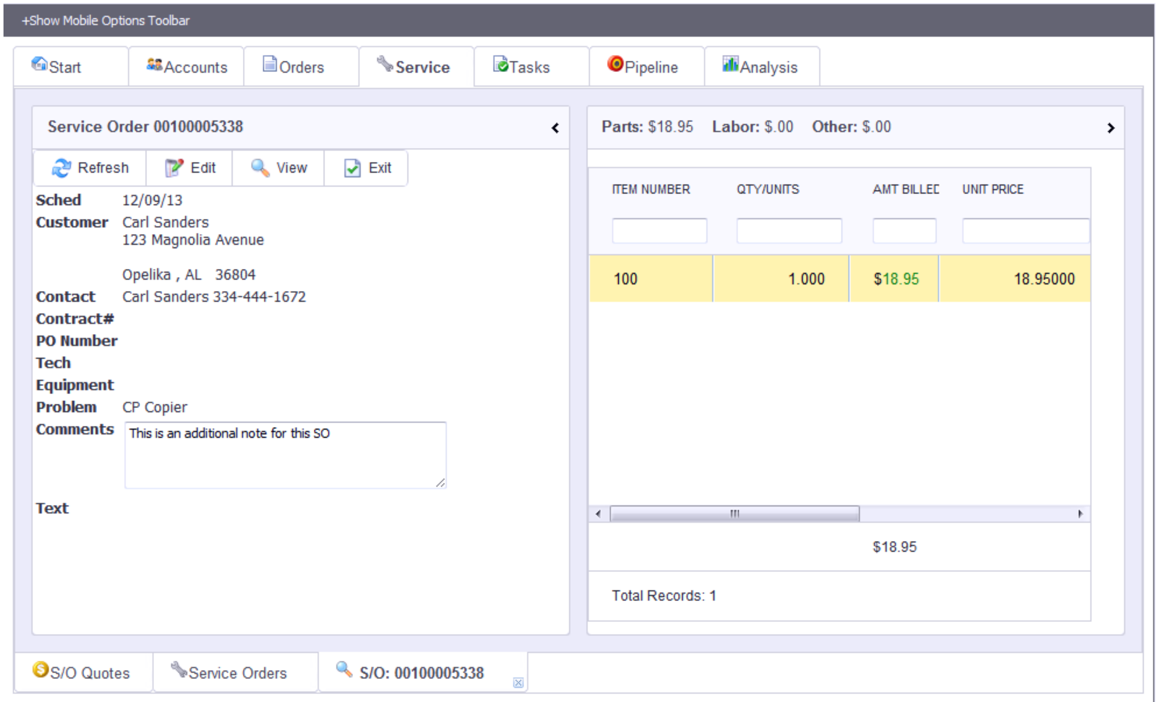
- Toggle between open and closed service orders
- Select a date range for the list

Press the green arrow beside a record to zoom to the details of the related service order.



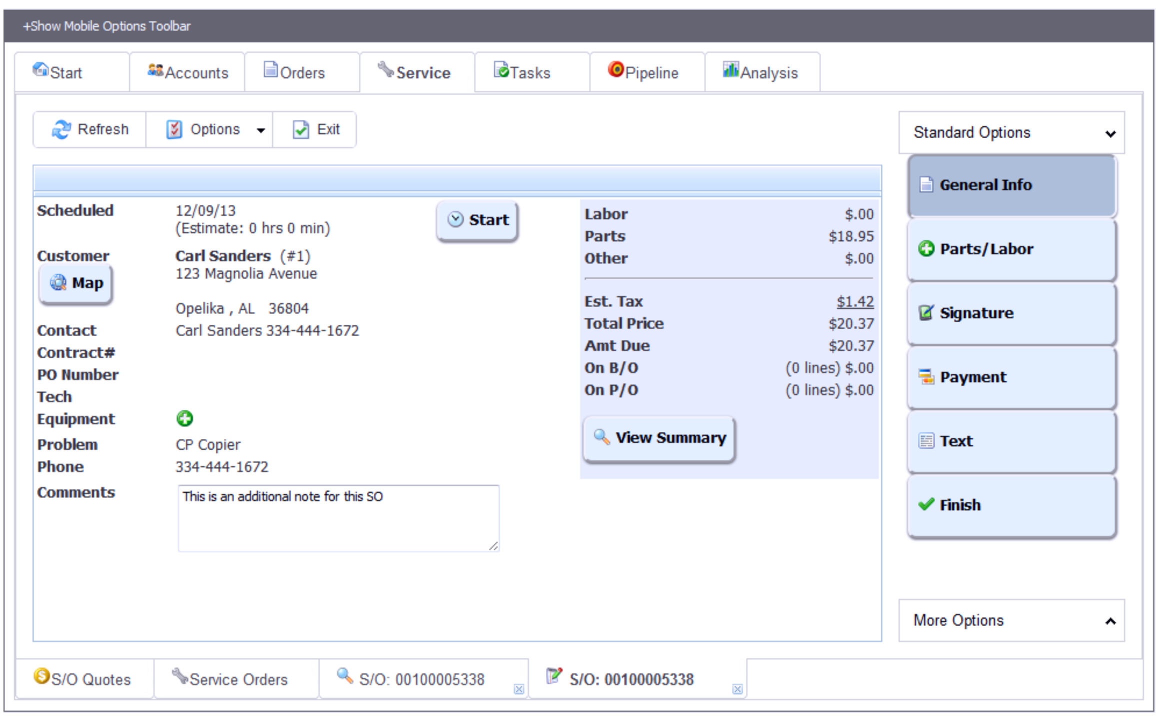
Service Order List

When you zoom on a service order you may view (and optionally edit) the details. You may also press the View button to display a browser page summary suitable for printing and review.



Viewing a Service Order

If you have operator security access to edit service orders you may click on the edit button to zoom to an edit screen. Changes you make are instantly updated in the record.



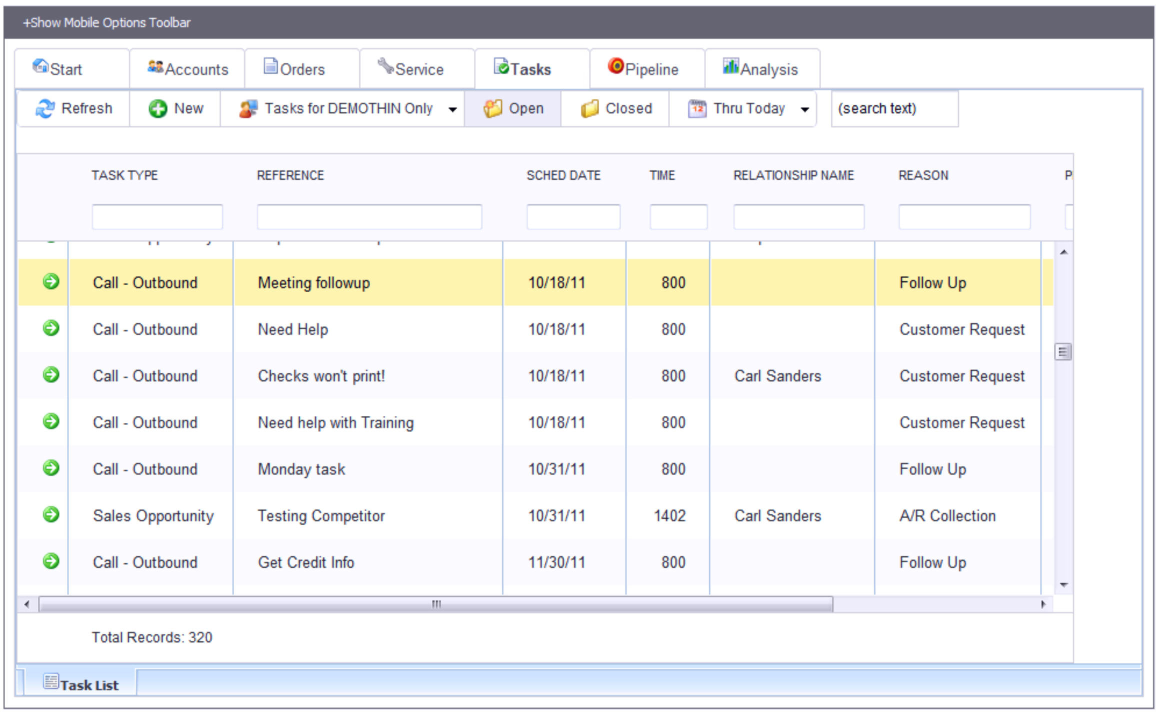
Editing a Service Order

Tasks Tab

The Tasks Tab page shows a list of tasks for your operator ID. You may sort or filter the list using the column headings. Using the toolbar buttons you can:

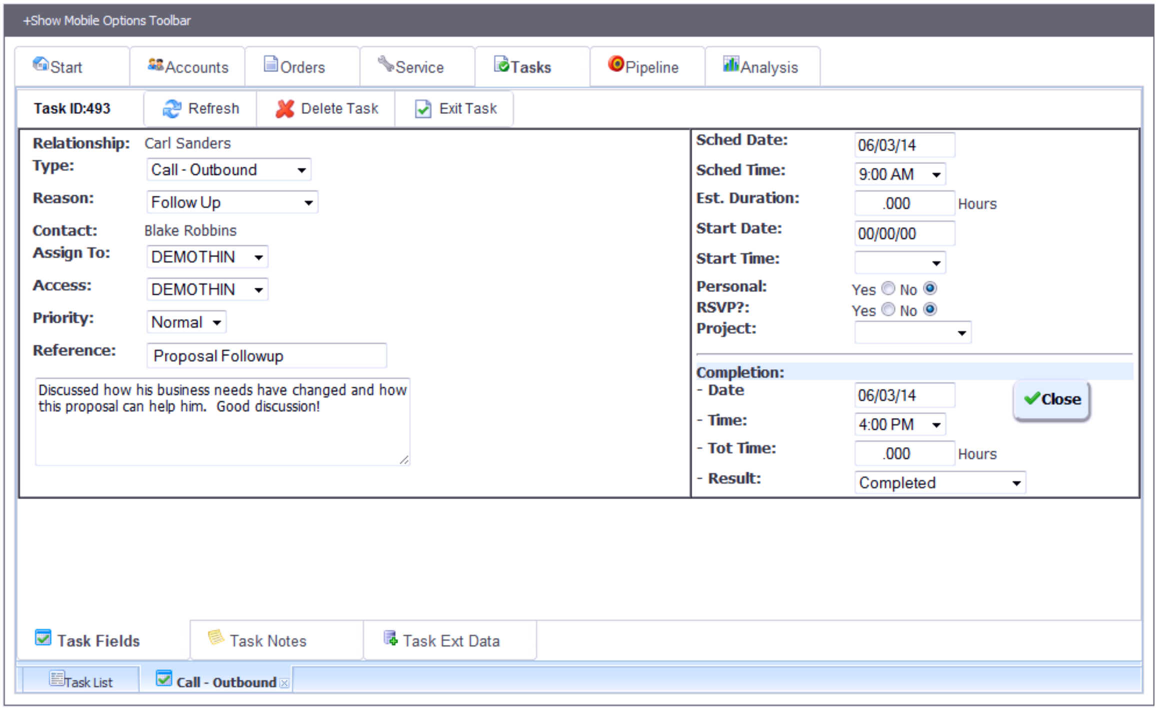
- Add a new task
- Include all tasks you can access (based on your access groups)
- Toggle between open and closed tasks
- Select a date range for the list
- Enter text to search for in the tasks. The search will include the task details and the reference field. For example, you could enter "widget" to find all tasks for the prospect that included the word "widget" in the text or reference fields.

Press the green arrow beside a record to zoom to the details of the related task.



Task List

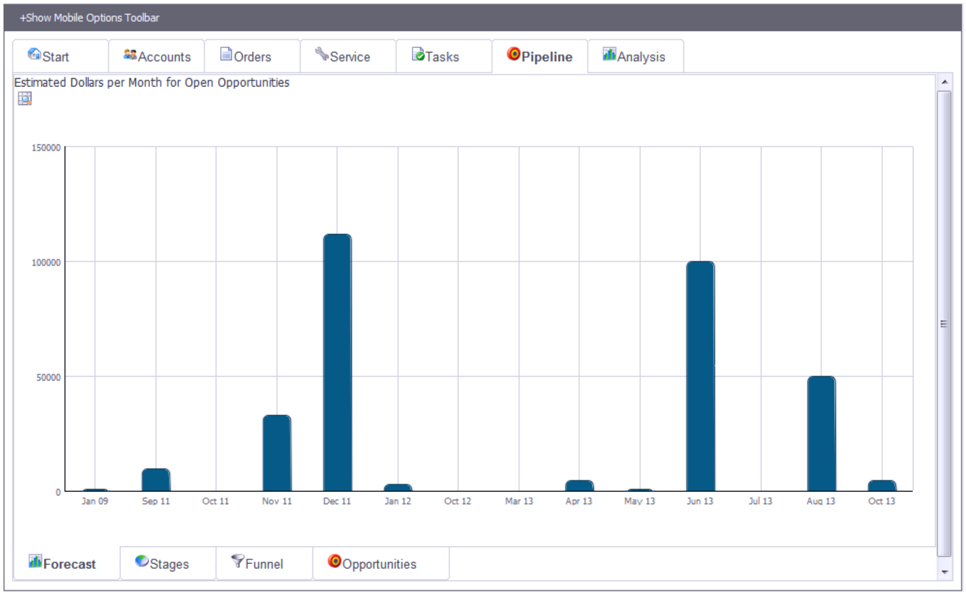
When you zoom on a task you may edit the details. Changes you make are instantly updated in the record.



Editing a Task

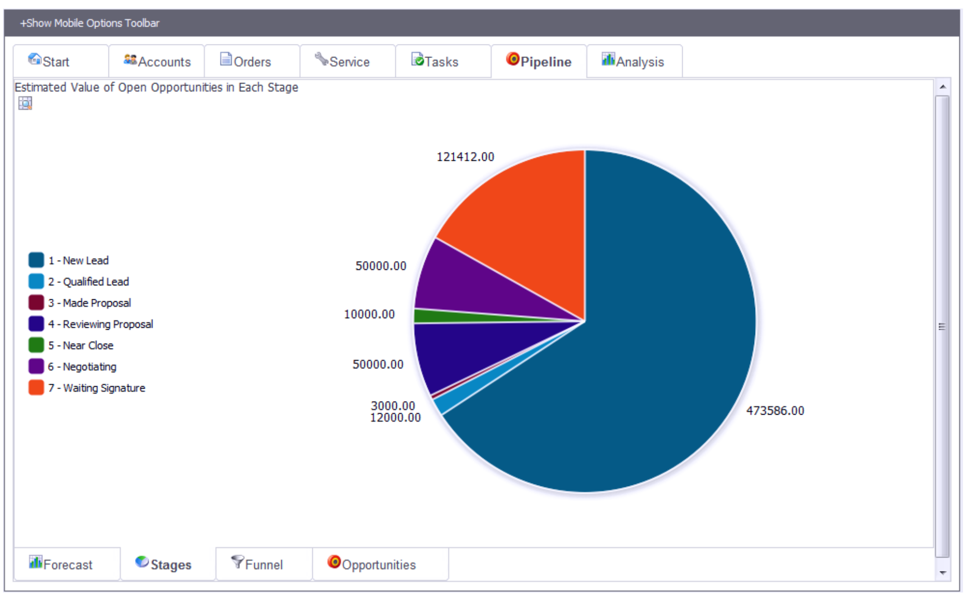
Pipeline Tab

The pipeline tab provides some charts and reporting to help you analyze the status and forecasts from your sales opportunities. It contains a set of sub-tabs including the following info:



Sales Pipeline Forecast

The Pipeline Forecast shows estimated future monthly sales from open opportunities.

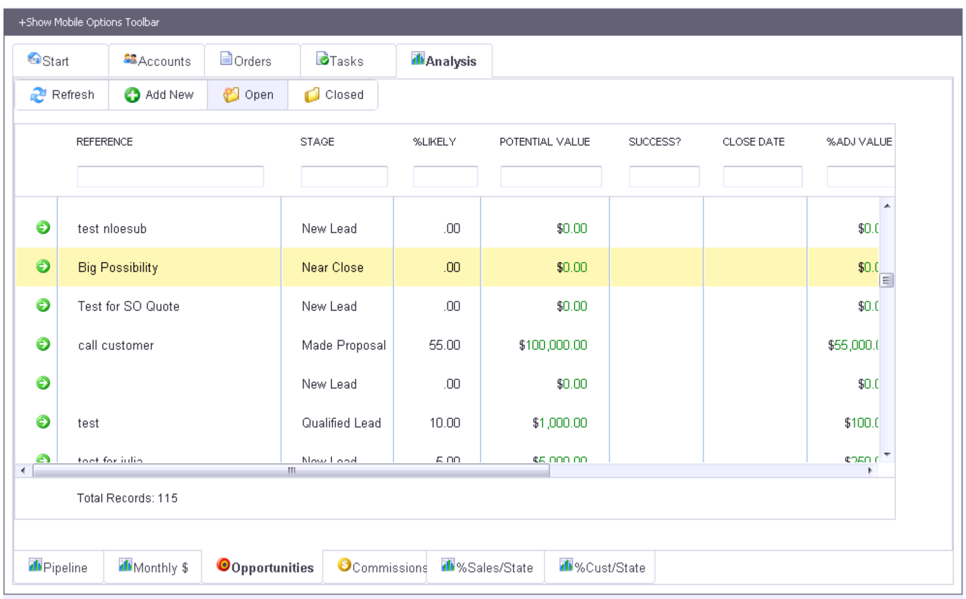


Opportunity Stages

The Opportunity Stages chart shows the total estimated value for each stage.

Opportunity Funnel

The opportunity funnel shows how many of your opportunities move through each stage. This chart shows all opportunities for the last 365 days.

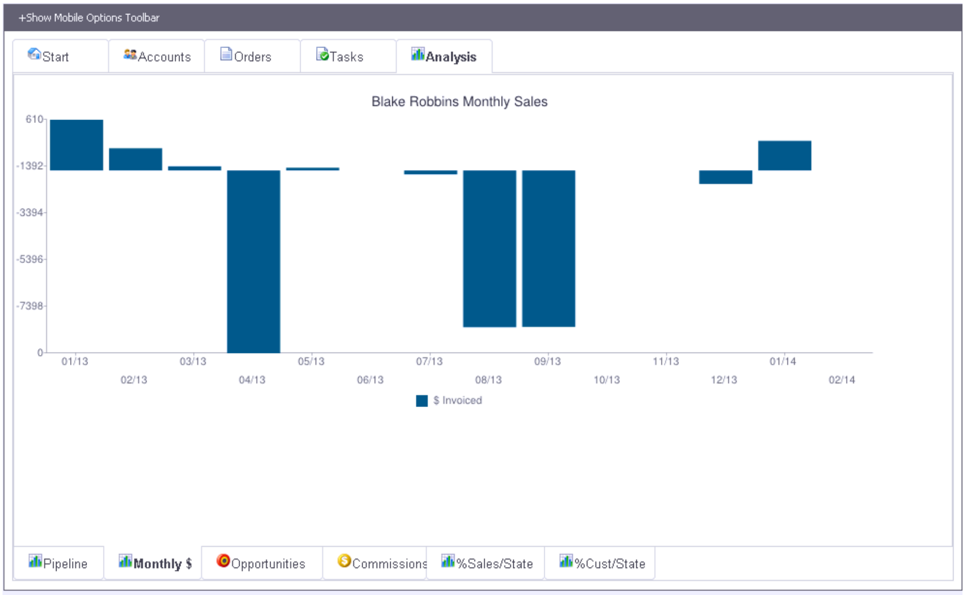


Opportunity Listing

The opportunity listing shows existing sales opportunities and allows you to zoom to review/edit opportunities.

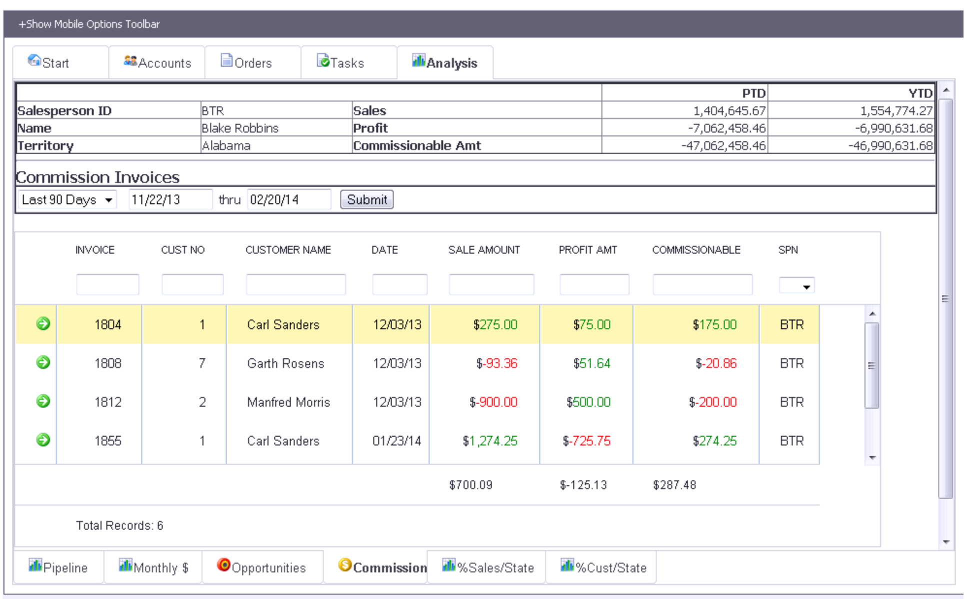
Analysis Tab

The analysis tab provides some charts and reporting to help you analyze sales-related activity. It contains a set of sub-tabs including the following info:



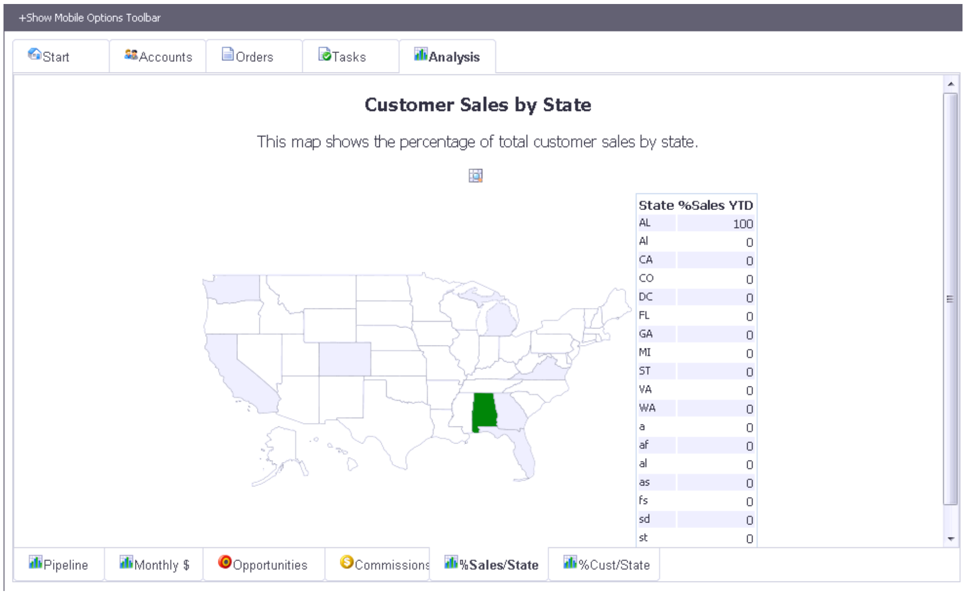
Monthly Sales

The monthly sales chart shows period sales for the salesperson.



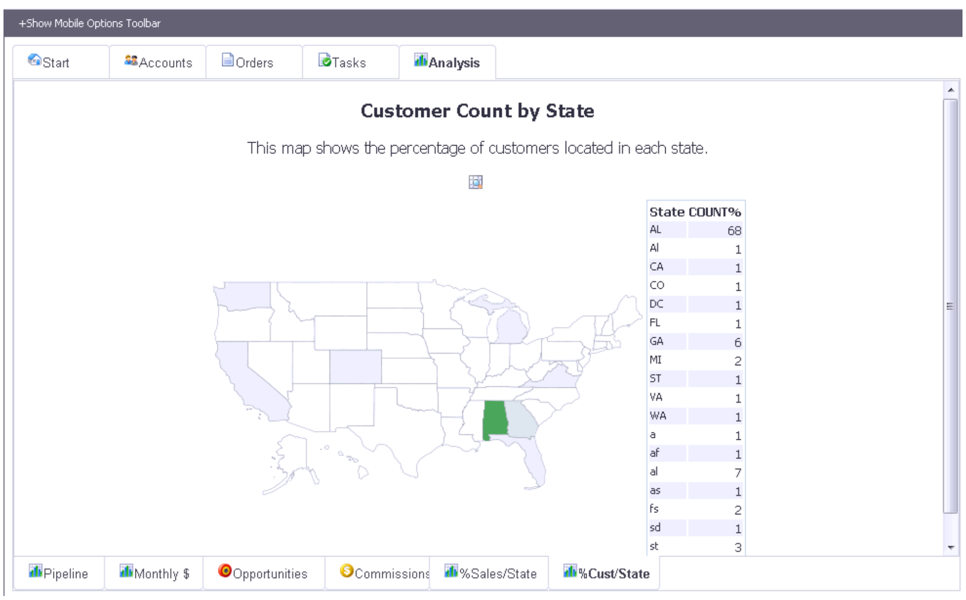
Commission Sales Review

The Commission Sales Review lets you see summary info about commissionable sales and see the commissionable info for individual invoices.



Customer Sales by State

The Sales by State shows the relative contribution of customers in each state to YTD sales.



Customer Location by State

The Location by State shows the relative number of customers in each state.

Order Entry Operator Options

In the SouthWare order entry operator record (RS-07-11) you define each order entry operator that will be using the system. OE operator portal-related options that are used in the Remote Sales portal include:

- Whether operator can change price
- Whether operator can see cost
- Whether operator can change discount
- Whether operator can sell from multiple locations
- Default location
- Whether operator can add a new customer
- Whether operator can access other operator orders
- Whether operator can enter a quote
- Whether operator can override default tax code
- Whether operator can override default salesperson code
- Whether operator can enter a reason for a line item return
- Whether operator can enter a partial return
- Default reason code for a return
- Whether operator can create a customer RA for returns
- Whether operator can delete an order
- Default non-A/R customer

Technical Notes

Below is a list of the NetLink request pages specifically for this portal:

Order Entry pages

- MTOEADDON – misc charges for order
- MTOEGETCUST – get customer info for OE
- MTOEHDRAJ – update header info
- MTOEITEMFIND – item lookup
- MTOELINECHG – edit line item
- MTOELINELIST – line item entry
- MTOEMAIN – main container for order including header info
- MTOENOTEADD – add note to order
- MTOEORDLIST – order listing
- MTOEPAYMENT – enter order payment info
- MTOEQTYCHGOPT – options for insufficient quantity – change mode
- MTOEQTYOPT – options for insufficient quantity on add
- MTOERECENT – recent customer purchases
- MTOERELATED – related items for a stock item
- MTOESHIPPING – order shipping info
- MTOESIGN – capture order signature
- MTOESIGNVIEW – view captured signature
- MTOESIGNAJ – update note with signature info
- MTOESTART – summary container for orders
- MTOETEXT – text entry for order
- MTOEVFYITEM – verify item number entered
- MTOEVIEW – view summary page

Other Remote Sales pages

- MTSLSACCTFIND – find account by name
- MTSLSACCTLIST – list accounts
- MTSLSACCTS – accounts tab hub
- MTSLSACTIVITY – customer activity listing
- MTSLSADDCONTACT – add new contact
- MTSLSADDPRO – add new prospect
- MTSLSADDTASK – add new task
- MTSLSAGING – list of customer aging totals
- MTSLSANALYSIS – analysis tab hub

- MTSLSCOMMISSION – commission sales analysis
- MTSLSCONTACTLST – sales contacts list/view
- MTSLSCONTACTVW – contact preview pane
- MTSLSCONTNOTE – add note to contact
- MTSLSCTRLST – list of contracts for a customer
- MTSLSCTRVW – contract preview pane
- MTSLSCUSTAR – customer A/R open items
- MTSLSCUSTNOTE – add note for customer
- MTSLSCUSTOMER – customer portal and container
- MTSLSFIND – global find results
- MTSLSFINDALL – global lookup for order item
- MTSLSGETNOTICE – retrieve current sales reminder text
- MTSLSHOME – page for Start tab
- MTSLSHUB – main container for Remote Sales
- MTSLSINVOICES – invoice listing
- MTSLSINVVIEW – invoice view
- MTSLSNOTICE – edit sales reminder text
- MTSLSNOTICEAJ – update sales reminder text
- MTSLSOPPLST – list of opportunities
- MTSLSOPPNEW – add a new opportunity
- MTSLSOPPNEWP – add opportunity products
- MTSLSOPPNEWAJ – add opportunity (import)
- MTSLSOPPTAB – opportunity tab container
- MTSLSOPPUPD – update an opportunity
- MTSLSOPPVIEW – view an opportunity
- MTSLSORDERS – salesperson order listing
- MTSLSPARTFIND – list find results for a line item part
- MTSLSPIPELINE – pipeline analysis
- MTSLSRELNOTE – add note for a relationship
- MTSALESMONTH – monthly sales
- MTSLSSOLIST – list of customer service orders
- MTSLSSOLISTH – service order history
- MTSLSSOTABS – container for service order tabs
- MTSLSSOVIEW – view customer service order
- MTSLSTASKEDIT – change an open task
- MTSLSTASKNOTE – add note to task
- MTSLSTSKLST – open task listing
- MTSLSTSKLSTH – closed/archived task listing
- MTSLSTW01VIEW – portal for prospect

- MTSLSTW02VIEW – portal for contact