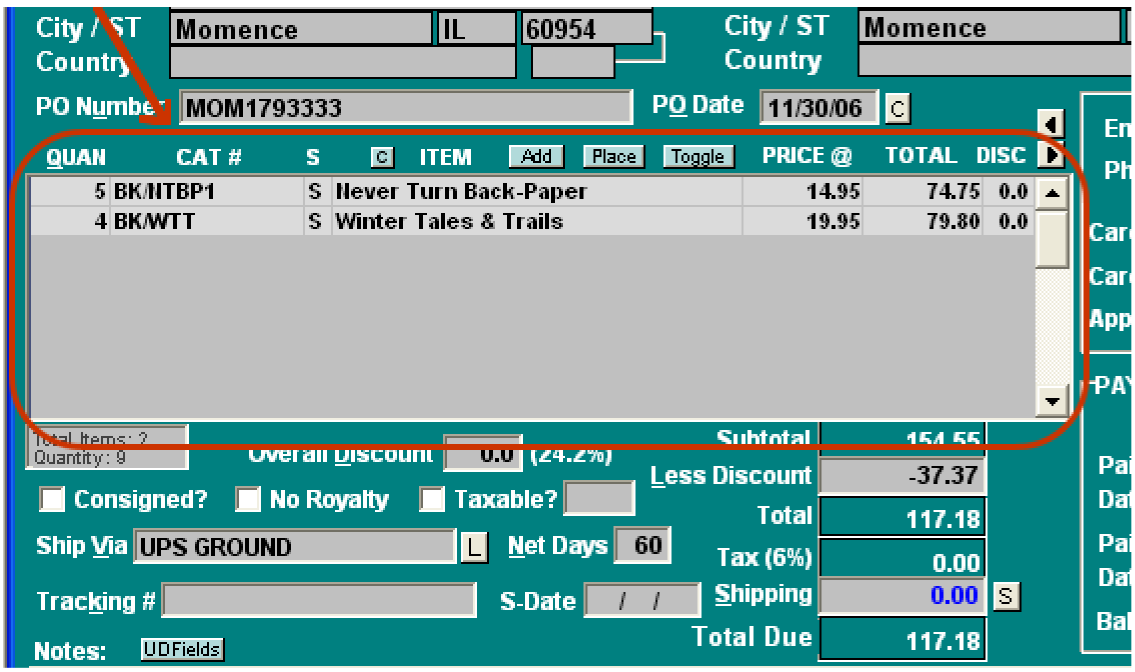
Entering Products on the Main Invoice Screen

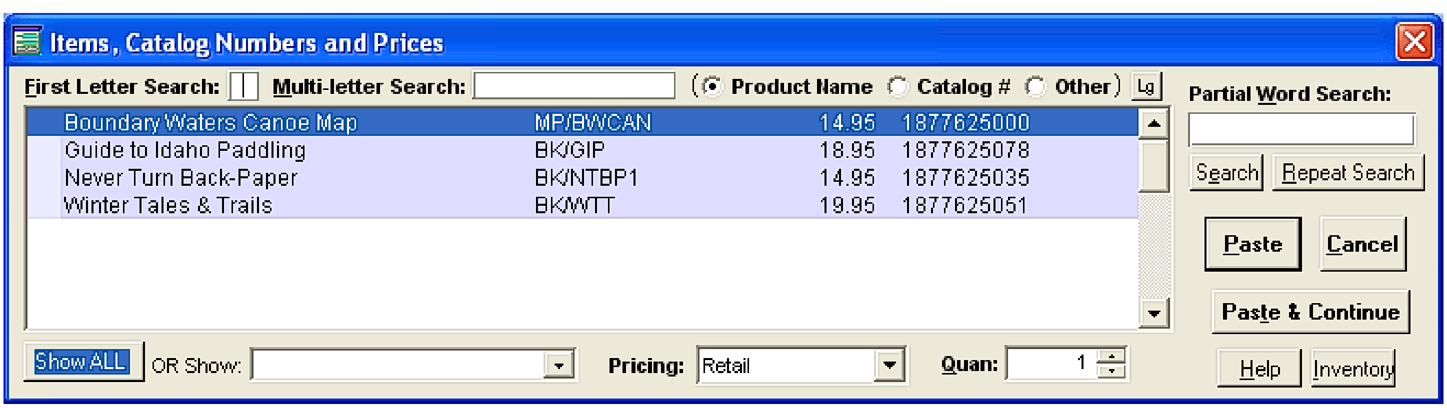
The Item Area: Where Products are Entered

When customers order products, they are entered in the *Item Area* on the Main Invoice Screen. Products can be directly typed into the Item Area, but the easiest way of entering products is to use the "Add" button (the light blue button just above the Item Area).

Item Area. Products are entered in the Item Area on the Main Invoice Screen. The easiest way to enter a product is to click on the "Add" button. A new row will be created in the Item Area, and the Product Pop-up list will appear from which you can select the desired product.



Product Pop-up List. This appears when you click on the "Add" button. To add a product to the Item Area on the invoice, select the one you want and click on "Paste."



Using the "Add" Button

Before using the "Add" button, you need to enter your products in the Product Database (PRODUCT TOOLS >> PRODUCT INFORMATION & CATALOG NUMBERS). Once you've done that, they'll show up on the Product Pop-up list that appears when you click on the "Add" button. Select the product from the pop-up list, and its name, catalog number and price will be entered for you

The "Add" button is used for adding a product to the Item Area

Sometimes it's handy not to have to reach for your mouse when entering lots of invoices, and thus, there is another way of activating the Product Pop-up List. Make sure your cursor is on the last item on the list and press the Down Arrow key your keyboard. That creates a new row in the Item Area. Then press CTRL+L on your keyboard to bring up the Product Pop-up List. The Product Pop-up List also has quick key combinations that you can use (click the "Help" button for information). If you have the Level V (or higher) program, there's another way of entering products. You can scan the barcode and the product will be automatically entered.

Using the "Place" Button

The "Place" button is used when you want to "place" a product in the Item Area. It's usually utilized when you need to overwrite a product already on the item list. To do so, position your cursor on the row of the product that you want to overwrite, then click the "Place" button. The Product Pop-up List will appear. Select a product and click on "Paste." The new selection will overwrite the old product on the list. You can also place your cursor on a blank row and the selected product will be pasted on that row.

The "Place" button is used for placing over (replacing) an existing product in the Item Area

An alternative way of replacing a product is to make the sure the cursor is on the row of the product to be replaced, then press CTRL+L on your keyboard.

Using the "Toggle" Button

The "Toggle" button opens the Alternative Product Entry Screen, providing you with another way of entering product information. The advantage of the Alternative Product Entry Screen is that it allows you to concentrate on one product at a time. It's a particularly expedient way of entering products that are not found on the Product Pop-up list.

The "Toggle" button activates the Alternative Product Entry Screen.

The Alternative Product Entry Screen includes information not available on the Main Invoice Screen. For example, it includes the product's identifying number. For books this may be the ISBN Number. If you sell other products, it could be the part number, color, size, etc. You can also use the Alternative Product Entry Screen to enter fractional quantities if you sell items by weight, length or other measurements. It may used to indicate fractions of an hour if you provide services which are billed by time. You'll find more information about the Alternative Product Entry Screen by clicking on the "Help" button or selecting HELP >> SEARCH HELP and finding the keyword: "Alternative Product Entry Screen." Web Link

Moving Around in the Item Area

Most of the time, the Add or Place buttons will take care of navigating the Item Area. Nonetheless, you can use the keyboard or mouse to move around in the Item Area to make changes or type-in products directly. To move into the Item Area use the Tab key on your keyboard and tab into it--or you may click on it with the mouse. Once in the Item Area, you can use the Tab key to move from column to column--or you can move from column to column by pressing the Right or Left Arrow key on your keyboard.

After you type in the information for the first row, you can move to the next row by pressing the Down Arrow key. That will create a new blank row on which you can type in a different product.

There are *no* limits to the number of different products you can enter. The Item Area has unlimited rows. It will keep scrolling down, allowing more space for more products. To move up and down the list of products use the scroll bars, or the Up and Down Arrow keys on your keyboard. (You can't use Page Up or Page Down to move up and down in the Item Area since those keys are used to moved to different invoices.)

In order to conserve space, the Item Area allows only one blank row at a time. If you press the Down Arrow key once, it creates a new blank row. But if you press it once more, no new rows are added. The same happens if you use Tab.

Catalog Number (Cat #)

All products in the Product Database have catalog numbers. When you activate the Product Pop-up List by clicking on the Add or Place buttons, the item's catalog number is entered along with the price and item name.

If you happen to know the catalog number, you don't necessarily need to activate the Product Pop-up List. Type in the catalog number in the Item Area and double-click on the word "Cat #." The product's name and price will be entered automatically. The word "Cat # is called a text button (or quick button). It doesn't really look like a button, but if you double-click on it, it acts like a button, duplicating one of the functions of the pull-down menu. In this case, double-clicking on the word "Cat #" is the same as selecting PRODUCT TOOLS >> LOOK-UP CAT # AND PASTE NAME/PRICE from the Menu Bar.

If you happen to remember a product's catalog number, there's a trick you can use. Type in the catalog number and double-click on the word "CAT #." AnyOrder will enter the name and price for you.

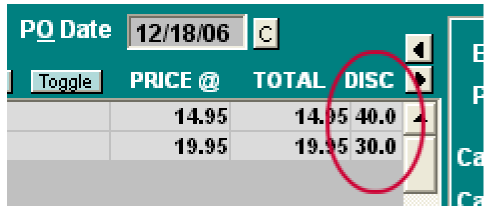
Expanding the Item Area

By clicking on the right arrow just to the right of "TOTAL," the Item Area will expand to show the Discount column.

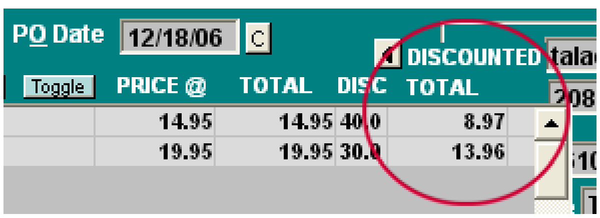
By clicking on the right arrow, the Item Area will expand and show the Discount column (see next page for an illustration).

To return to the regular configuration, click the left arrow. The Discount column allows you to enter different discounts for individual products. (Note: if the discount is the same for all products, it's easier to place a number in the "Overall Discount" blank just below the Item Area.)

The Discount (DISC) column appears after clicking the right arrow just above the Item Area. Use this column if you need to discount products at different percentages.



By clicking on the right arrow one more time, the Item Area will expand to the show two more columns (see illustration below). The largest column is the "Discounted Total" column. This column shows the total of the item (quantity multiplied by price) minus any discount. (Note that this figure is rounded to the nearest hundred. Because there is rounding involved, the sum of the discounted total column may be slightly different than the Total figure, just below the Item Area. Level V users can increase the precision by upping the number of decimal points in the discount column in the Basic Program Set-up.)

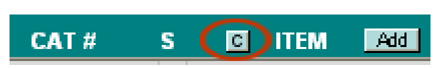


The "Discounted Total" column appears after clicking the right arrow one last time. It shows the total amount minus the discounted percentage. There's also a very small column just to the right of Discounted Total. This column is used if you have different pricing levels. It easiest to use the Alternative Product Screen (by clicking the "Toggle" button) for entering pricing levels, but they can be entered in the Item Area as well.

The narrow column at the very end of the Item Area is the "Pricing" column. Because of space restrictions, the pricing column isn't labeled, but it's the last column when the Item Area is expanded all the way. If you have set up pricing levels in the Product Information Database, you can indicate which pricing level you want for the product in this column. Pricing Levels are indicated by a number. To view a list of your Pricing Levels and the associated number, click on the "Toggle" button. The Alternative Product Entry Screen will appear. The Pricing Levels, if any, are listed on the right side of the screen.

If you have the Item Area extended all the way to the right (so that the Discounted Total column shows), it will cover up a portion of the credit card fields. After viewing this portion of the Item Area, most users will return to one of the other settings so that the credit card fields are fully visible.

Changing the Width of Columns in the Item Area

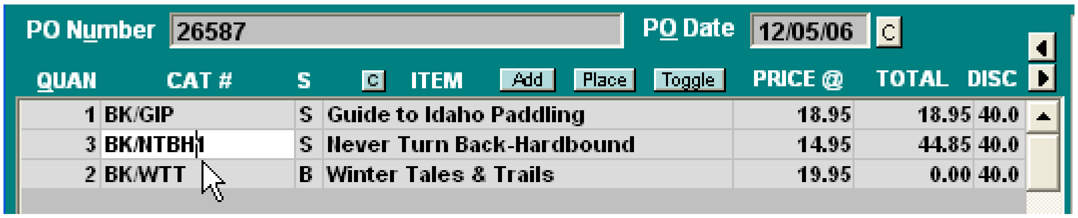


To change the width of the columns in the Item Area, click on the "C" button, located just before the word "ITEM." "C" means "Column" adjustment. When you click on it, a set of column labels will appear at the top of the Item Area. By dragging the lines between the column names with the mouse, the columns can be narrowed or widened. To lock this setting in place, click on the "C" button again. The column names will disappear and the new column sizing will be retained as you continue work in AnyOrder. You can return to default column widths by refreshing the screen by selecting INVOICE TOOLS >> REFRESH SCREEN from the Menu Bar.

Deleting a Row in the Item Area

To delete a row in the Item Area, place your cursor on the row that you want deleted and select PRODUCT TOOLS >> DELETE CURRENT ITEM ROW. A quicker way of deleting the row is to press CTRL+D on your keyboard.

To delete a row in the Item Area, place your cursor on the row to be deleted. Press CTRL+D.



The row is deleted . . .

The S-Code Column

Between the CAT # and ITEM columns on the Invoice Screen is the "S" column for S-Code. S-codes are also called "Sale Type Codes." You can cycle through the codes by pressing the space bar. Or you can bring up the list by selecting EDIT or PRODUCT TOOLS and PASTE FROM ITEM S-CODE LIST from the Menu Bar. (The S-code list is also accessible from the Alternative Product Entry Screen.)

The S-code column is a key part of the Item Area. The program automatically enters "S" here for you which means "Sale." There are several other codes you may wish to use. For example, "R" is used for returned items, or "B" is used for back ordered, etc.

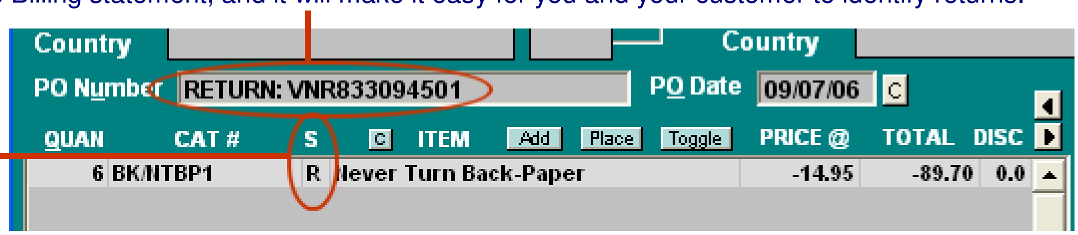
The S-Codes and How to Use Them

S - Sale. This is the default code. It is used the most, and it means that the item listed is a regular sale. You don't have to type in "S." The program assumes that the item is a sale and automatically enters it for you.

R - Return. Use this code to indicate items that have been returned. In particular, use this code when the item is in good shape and *will be returned to your inventory*. If the returned item is not in good shape and you will *not* be returning the item to your inventory, use the "D" code, below. When you use the "R" code, the customer will be credited. It is possible to combine returns and sales on one invoice, but making out a separate invoice for returns makes it easier for you and your customer to identify return transactions. Type in "RETURN" or an abbreviation of return ("RETRN") in the PO Number field followed by the customer's return number, if any. (The PO Number field shows up on AnyOrder's Billing Statements and the notation helps you quickly identify a return.) See "Returns, How to Deal With" in the Help documentation for more details. Web Link

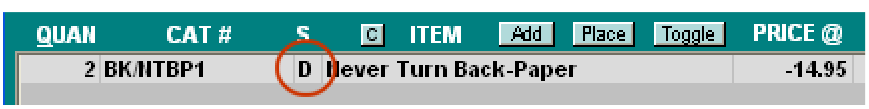
For returns, type in the word "RETURN" in the PO Number field followed by the customer's return number if any. The PO Number field shows up on the Billing statement, and it will make it easy for you and your customer to identify returns.

In the Item Area, use the code "R" for Return. AnyOrder will automatically credit the customer.

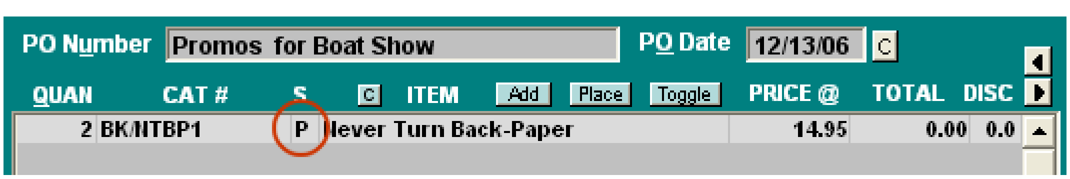


HINT: *Note that sometimes a customer's computer will calculate the amount of the credit slightly differently than AnyOrder. When that's the case, you can use PRODUCT TOOLS >> CALCULATE DISCOUNT to adjust the discount so that the two figures match.*

D - Damaged Items. Use this code to indicate items which were damaged during shipment to the customer. The customer will be credited. You may also use this sales code to indicate returned items which are damaged and are no longer saleable. Unlike returns (above) AnyOrder does *not* place damaged items back into inventory. Note: the "D" code should only be used for items which have been originally been invoiced as a sale ("S" code). If the item has *not* been invoice with an "S" code, then don't use the "D" code. For more information, see "Damaged Items, Use of "D" Code" in the help documentation that comes with the program. Web Link

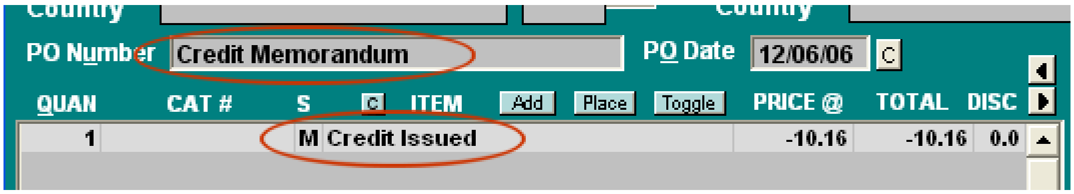


P - Promotional Item. Use this code to indicate items which you are giving away for promotional purposes. The code may also be used for donated items. The customer or recipient will not be charged. The program will keep track of the number promos and remove them from inventory. When you run an inventory report, the number of promotional copies are listed.



The "P" code is used for items are given away for promotional purposes. Note that when the "P" code is used, the retail price is shown but the total amount is zero (0).

M - Credit Memorandum. Use this code when you want to indicate that the customer should receive a credit. *This code is not used for damaged or returned items. Use the "D" and "R" codes for that purpose.* If you use the "M" code, type "Credit Issued" in the ITEM column and the amount of credit in the PRICE column. Be sure to type in "1" under the QUAN column. The total is figured by multiplying the quantity and price. Lastly enter "Credit Memorandum" in the PO Number blank. (The PO Number field shows up on AnyOrder's Billing Statements and the notation helps you quickly identify credit memos.)

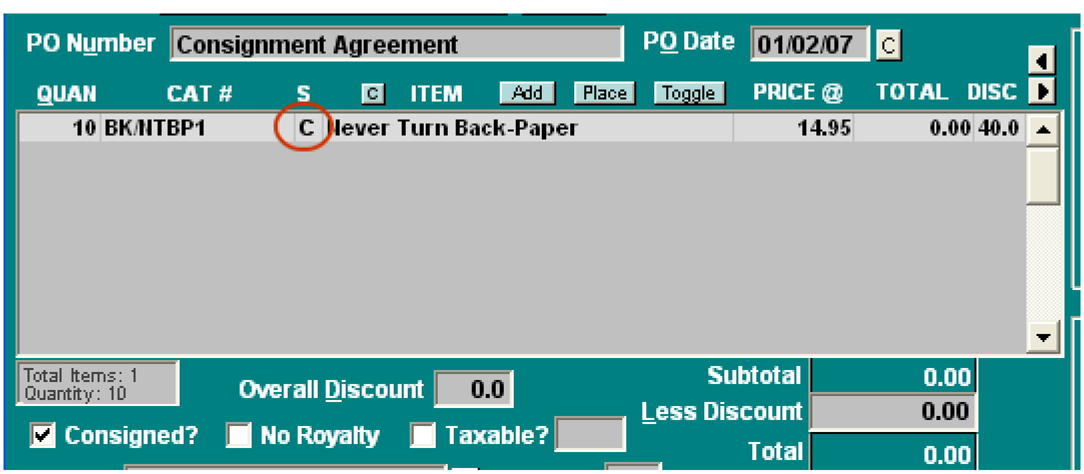


Use the "M" code for credit memos. In the PO Number blank, type in "Credit Memorandum." In the Item Area, enter "M" and "Credit Issued." The program will do this automatically if you select from the Item S-code list (EDIT >> PASTE FROM ITEM S-CODE LIST).

If you choose the "M" code from the "Paste from Item S-Code List," the program will automatically enter "Credit Memorandum" in the PO Number blank and "Credit Issued" in ITEM.) We recommend that you always make out a separate invoice when using the "M" code. It makes it much easier for you and your customers to identify credit invoices when you print out billing statements. However, if necessary you can mix the "M" code with other codes. See "Credits, How to Indicate" in the Help documentation for more details.

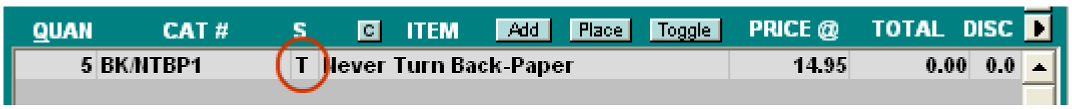
C - Consigned Item. Use this code to indicate items that you provide to a vendor on consignment: the vendor does not pay you until the items are sold. When you place goods on consignment with a vendor, those goods are not considered sold--nor are they considered an account receivable until the vendor notifies you they have been sold. When the "C" code is used, the customer is not charged. Rather the invoice serves as a memorandum that the customer has been entrusted with your products on a consignment basis.

Use the "C" code for consigned items. This invoice serves as memorandum that the customer has been entrusted with your products. When the items are actually sold, you would issue another invoice with the "S" code. When dealing with consigned items, be sure to check the "Consigned" box. If the customer is in the Customer Database, the box will be checked for you automatically.



When, at a later time, the consigned products are sold, you would issue the vendor a new invoice. The new invoice would list the sold items using the "S" code (for regular sale) AND you would also check the CONSIGNMENT ITEM box on the Invoice Screen to indicate that items sold had been on consignment. For more information, see "Consignment Wholesalers & Distributors" in the help documentation. Web Link

T - Take Back of Consigned Item. Use this code when you take back items that you originally left on consignment. Let's say you left 10 books at a store (recorded on an invoice with a "C" code). After a few months, it becomes obvious that the store isn't going to sell all 10, so you stop in and take back 5 of them. An invoice is created and a "T" code assigned to the 5 books. The customer is not charged or credited. Rather the invoice serves as a memorandum that you have taken back products previously entrusted to the customer on a consignment basis. It also makes the proper adjustment in your inventory, enabling you to keep track of consignment inventory through inventory reports provided by the program.



B - Back Ordered. Use this code when you don't have the item in stock, but expect to have it soon. The customer is not billed, rather it's a notice to your customer that you'll ship the item when it comes available. When that time comes, you then list the item on a new invoice under the "S" code. For more information, see "Back Orders" in the help documentation. Web Link

Use the "B" code for back-ordered items.

X - Back Ordered Item Shipped (or Canceled). This code is mostly for your use. A back ordered item will be listed with the "B" code. When the item becomes available, you'll issue a new invoice, this time using the "S" code for a sale. To remind you that the back order has been filled, go back to the original invoice and change the "B" to "X." You can also use an "X" if an item is back ordered and the customer decides to cancel the back order. For more information, see "Back Orders" in the help documentation. Web Link

N - No Longer Available (Discontinued). Use this code when someone orders an item that has been discontinued and you no longer carry it. A note will appear on the invoice notifying the customer that the item is no longer available.

F - Fees. Use this code when a customer charges you fees, and the fees are subtracted from what the customer owes you. For example, let's say you sell a product to a distributor. The distributor warehouses your product and charges you a storage fee. If the fees offset some of what the customer owes you, then you should record the fees on an invoice. In the Item column, you would type "Warehouse Fees." In quantity, type "1," and in the price column, type in the amount of the fees. For more details, see "Consignment Wholesalers & Distributors" in the help documentation. Web Link

U - Unacceptable Returns. This code compliments the Return code ("R"). Use it to indicate items that have been returned and should NOT be credited to the customer. Normally when items are returned, you would credit the customer. But some returns may be so egregiously damaged that the customer should not be credited. This is the code to use in such situations. See "Returns, How to Deal With" in the Help documentation for more details. Web Link

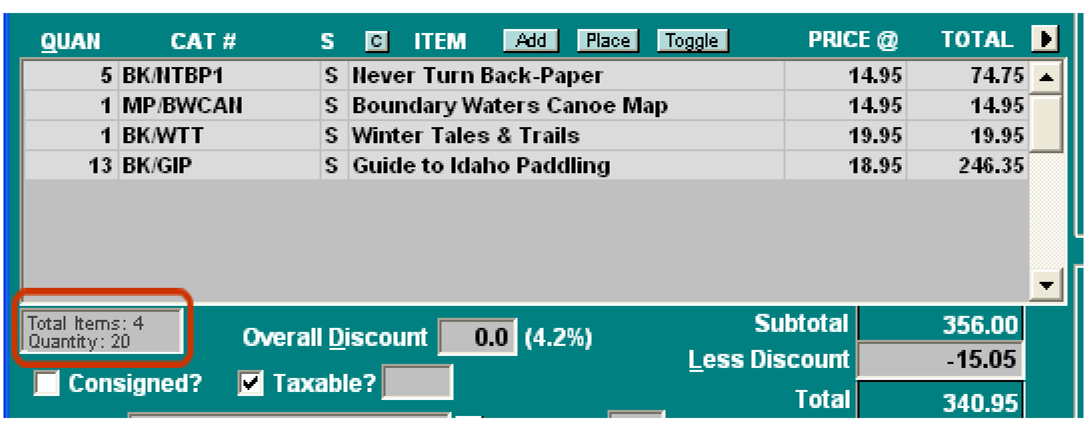
Since Unacceptable Returns will not go back in the inventory, no adjustment is made to the inventory. Upon running an inventory, the total number of Unacceptable Returns appears on the Sales Activity and Inventory Report Screen.

Note that some distributors may expect you to issue them a credit no matter how badly returns are damaged. You'll need to check in advance with your distributor before using this designation.

I - Internal Use Code. This is a temporary code which may be used for your own purposes. The "I" code is not intended for use on finished and printed invoices, and it makes no adjustment to the inventory. You may find it useful as a temporary means of flagging certain products on invoices. As an example, you could use it for marking out-of-stock items. Normally you would use a B code for backordered items. However, if you expect a re-stocking shipment to arrive shortly, you may hold the order open and temporarily mark the out-of-stock items with the "I" code. When the shipment comes in, you'll be able to quickly find the appropriate invoices by setting the filter to an S-code of "I" (or do an Advanced Search for "I" S-codes). When the order is filled, the temporary "I" codes should be changed to "S" codes. If they are not changed, the items will not appear in sales or inventory reports. Make sure you have a system in place that you don't forget to make the change. Level IV and higher users can get a per product count of "I" code use by using the TOOLS >> MORE DATA menu in the Sales Activity and Inventory Report Screen.

Item Area Summary

The Item Summary is a small shaded rectangle located just below the Item Area on the left edge of the screen. The Item Summary includes two numbers: 1) the number of different items listed; and 2) the total quantity of all items combined.



The Item Summary is helpful when you are ready to package and ship an order. It tells you how many different items should be in the package and the total quality.

The summary is helpful when it comes time to package and ship an order. Before sealing the package, make a count of the different products that you've packaged. That number should be the same as the first number in Item Summary. Then make a count of the total quantity of all products combined. That number should be the same as the second number.

More Information on Entering Products

The help documentation that is built into the program has many more details about entering products. Additionally, nearly all of the dialog boxes that you'll come across have "Help" buttons which will bring up information specific to the topic at hand.