Introduction to the Epicor Learning Center

Robert:

You'll use Sales Orders to make transactions with customers; they start the process of any sale.

Andrew:

I haven't used that yet; can you walk me through it?

Robert:

Yeah, I'll show you the basics! Pick a topic to get started!

Topics

- Creating Sales Orders
- Finding Sales Orders
- Sales Order Cycle

Creating Sales Orders

Select the Order button on the Home tab to create a Sales Order.

To start a New Sales Order, navigate to the Home tab, and select Order.

Type the customer name in the Customer field, and then press Enter.

As long as the name you entered matches a customer record, BisTrack adds the information to the order. Otherwise, use the Find function to locate the customer you want.

Select OK.

BisTrack adds the customer's default address to the order. However, your customer might have multiple addresses. You can change the delivery address by selecting the Deliver To button.

You can add a new address on the fly or create a delivery location, using a One-Time Address.

Set the Date required to when the customer expects the ordered products. This applies to delivery or pickup.

The sale Invoice will display today's date.

Your administrator can set up a System Option to automatically calculate the Date Required.

You can select a different date using the drop down calendar or by entering a plus sign followed by a number of days in the Date Required field.

Assign the order's Sale Type. You'll use Quick Sale, Will Call, and Delivered the most.

Use the Quick Entry dialogue box to add items to the Sales Order.

Select a display option from the dropdown.

A Best practice is the use the Product, Quantity, Price selection.

You can enter a Product Code, Barcode, or Description.

Press Enter, and BisTrack adds the product to the Sales Order, or displays the Find Products window.

Adjust the quantity, and price as needed; press Enter to add the product to the window.

When you add products to the Sales Order, BisTrack displays the product details in the Lines Entry.

Use the scroll bar to see additional item details.

Use these buttons to add or make changes to lines on the Order.

BisTrack displays updated totals for all of the lines on the order, and shows the Sales Orders status, Cash Balance if any, and order Total in the status bar.

Finish the order by pressing the Complete button.

Enter the payment details in the sales Order Completion window and then select Finish.

This saves the order, assigns it a Sales Order document number, and opens a new Sales Order Window.

Finding Sales Orders

Use Find Documents to locate existing Sales Orders. Press the Show Me button to watch a step-by-step guide.

Select the Find Documents function from the Navigation pane to search for existing Sales Orders.

Set the document type to Sales Order, and enter your search criteria.

Double-click the Sales Order you want to open.

Show Me

You can recall saved Sales Order documents using the Find Documents function on the Home tab.

Set the Look for field to Sales Order, and fill in your search criteria.

Press Go to run the search.

If you run the search while leaving this field blank, BisTrack will display all sales orders.

If you don't know the order number, adjust these fields to search by different criteria.

To find all Sales Orders for a specific customer, change the information to Where Customer Equals the customer name.

Select, and double-click an order to open it in a new window.

Since you can search by any field available, you can quickly find any Sales Order that you're looking for with the Find Documents Function.

Sales Order Cycle

The Sales Order Cycle starts with a New Sales Order and ends when it's invoiced.

Read More…

An order can move through the statuses quickly depending on the customer's credit, available stock, delivery options, and payment.

Statuses in order:

- New Sales Order
- Will Call or Delivered
- Credit Hold
- Waiting for Stock
- Picking
- Pick Up or Delivery
- Invoicing
- Invoiced

The Sales Order Cycle begins when you create a new sales order and ends when it's invoiced.

It moves through several other statuses depending on the customer's credit, available stock, delivery options, and payment.

Quick Sales jump right from New Sales Order to Invoiced.

Delivered and Will Call orders take a few more steps.

If the customer does not have enough credit for the order, BisTrack places them on Credit Hold until the Credit Controller releases the order.

The process stops until the Controller clears the hold.

The next status in the cycle is Waiting for Stock.

This status signifies that there is not enough stock on hand to fill the order.

Once stock is available, the Order's status changes to Picking.

After you pick the order, BisTrack moves it to the Delivery or Pickup status depending on the Delivered or Will Call Order Type.

The status changes to Invoicing when the customer receives their product.

When you send the bill to the customer, the status changes to Invoiced.

The Sales Order Cycle typically moves quickly, and each status enables quick and consistent transactions to stay ahead of your customer's needs.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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