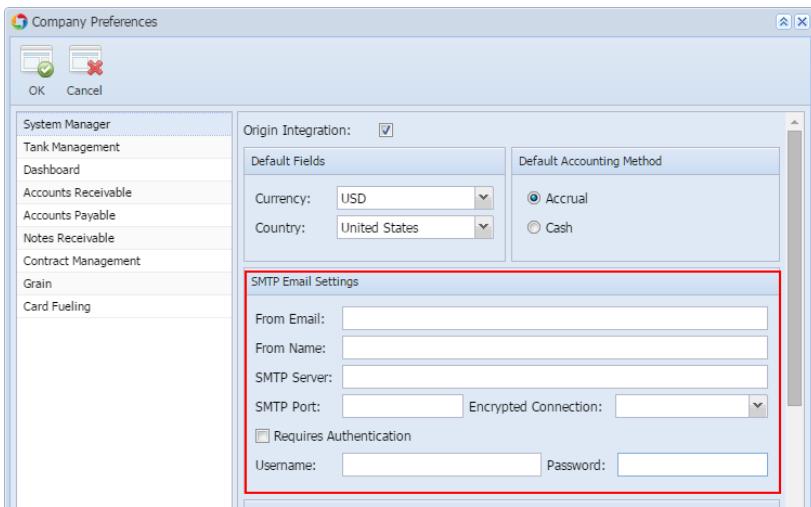


Sales Usability

Description		How To
1. Create a Customer		<p>Go to Sales > Customers</p>
		<p>If the search grid is displayed, click New button to open a new Entity screen.</p> <ul style="list-style-type: none">▪ Make sure Entity Type shows Customer.
		<p>Provide the required customer details:</p> <ul style="list-style-type: none">▪ Entity tab > Name, Contact Name, Location Name▪ Customer tab > Terms <p>Fill out the Email field.</p> <p>Fill out other fields on Entity tab and Customer tab, if necessary.</p> <p>Save the customer record.</p>
2. Add a customer Location		<p>Go to Sales > Customers.</p> <ul style="list-style-type: none">▪ Open an Entity customer record, then go to Locations tab.
		<p>Click Insert button.</p>
		<p>Provide the required details - Location Name and Terms.</p> <p>Fill out other fields if necessary.</p> <p>Save and close the Entity Location record.</p>
3. Add a customer Contact		<p>Go to Sales > Customers.</p> <ul style="list-style-type: none">▪ Open an Entity customer record, then go to Contacts tab.
		<p>Click the Insert button.</p>

	<p>Provide the required details - Full Name. If the Portal Access is checked, Email (username) will become a required detail.</p> <p>Check the Portal Access check box</p> <p>Provide the Email (username).</p> <p>Fill out other fields if necessary.</p> <p>Save the changes.</p> <p>Click the Change Password button and enter the new contact password.</p> <p>Save the changes.</p> <p>Click the Email Login button to send the login credential to the contact's email add.</p> <ul style="list-style-type: none"> ▪ Note: For this to be successful, the System Manager > Company Preferences > SMTP Email Settings should be properly configured. 
	<p>Go to Portal Permissions tab.</p> <p>Check the menus that will be accessible to the contact.</p> <ul style="list-style-type: none"> • Note: If User Type is Admin, you can check/unchecked the Customer Contact List menu. <p>Save and close the Entity Contact screen.</p>
	<p>Open the i21 login page on another tab.</p> <p>Use the customer contact's credential to log on to i21.</p> <ul style="list-style-type: none"> • User Name - enter the contact's Email add. • Password - enter the contact's password. • Company - enter the company where the contact belongs to.
4. Create a Quote	<p>Go to Sales > Quotes</p>
	<p>If the search grid is displayed, click New button to open a new Quote screen.</p>
	<p>Provide the required details on header area - Customer, Location, Bill To, Ship To, Terms.</p> <p>Fill out other header fields if necessary.</p>
	<p>Add an item in the grid area.</p> <p>Provide the following details - UOM, Ordered, Price.</p> <p>Fill out other grid fields if necessary.</p>
	<p>Set the Quote Status to Won.</p> <p>Click the Process button to process this Quote to Sales Order.</p> <p>Close the Sales Order screen.</p>

5. Create a Sales Order		<p>Go to Sales > Sales Orders</p> <p>If the search grid is displayed, click New button to open a new Sales Order screen.</p> <p>Provide the required details on header area - Customer, Location, Bill To, Ship To, Terms, BOL No, Freight Terms, UOM.</p> <p>Fill out other header fields if necessary.</p>
		<p>Add an item in the grid area.</p> <p>Provide the following details - UOM, Ordered, Price.</p> <p>Fill out other grid details if necessary.</p>
		<p>Click the Process button to process this Sales Order to Inventory Shipment.</p> <ul style="list-style-type: none"> • Note: <ul style="list-style-type: none"> ◦ Price equal to 0.00 will not be processed. ◦ Items with Item Type equal to Non-Inventory, Service, and Other Charges are not allowed to be processed to Inventory Shipment.
6. Create an Invoice		<p>Go to Sales > Invoices</p> <p>If the search grid is displayed, click New button to open a new Invoice screen.</p> <p>Select a Customer. (If the Add Inventory Shipment screen is displayed, close it)</p> <p>Provide the required details on header area - Customer, Location, Bill To, Ship To, Terms, Freight Terms.</p> <p>Fill out other header fields if necessary.</p>
		<p>Add an item in the grid area.</p> <p>Provide the following details - UOM, Ordered, Price.</p> <p>Fill out other grid details if necessary.</p>
		<p>Save the record.</p> <p>Click Post button.</p>
		<p>Click the Print button to view the preview of the Invoice report.</p>
		<p>Click the Email > Email Template - this will open the Email Template screen.</p> <p>Provide the Email Template details.</p> <ul style="list-style-type: none"> ▪ Check the Default check box button. ▪ On Email Sender field, enter the email that you want to appear on the sent email. ▪ Attach your company logo or any image. ▪ Enter the Email Header text. ▪ Enter the Email Footer text. ▪ Save and close the Email Template.
		<p>Back to Invoice, click the Email > Email Invoice button. This will send the Invoice to the customer's primary contact.</p> <p>Close the Invoice screen.</p>
7. Create a Credit Memo		<p>Go to Sales > Credit Memos</p> <p>If the search grid is displayed, click New button to open a new Credit Memo screen.</p> <p>Provide the required details on header area - Customer, Customer, Location, Bill To, Ship To, Terms.</p> <p>Fill out other header fields if necessary.</p>
		<p>Add an item in the grid area.</p> <p>Provide the following details - UOM, Ordered, Price.</p> <p>Fill out other grid details if necessary.</p>

		Save the record. Click Post button .
		Close the Invoice screen.
8. Pay the Invoice	Via Receive Payment	Go to Sales > Receive Payments
		Select the Deposit Account . Use the Location and Currency to filter the records in the grid. In the grid area, look for the the Invoice you want to pay. <ul style="list-style-type: none">■ Enter a Payment.■ Select a Payment Method.■ Enter Notes if necessary. Click Post button . Close the Receive Payments Posting Details screen.Close the Receive Payments screen.
	Via Receive Payment Details	Go to Sales > Receive Payment Details
		Select a Customer .
		Provide the required details - Location, Deposit Account, Payment Method .
		In the grid area, look for the Invoice you want to pay. <ul style="list-style-type: none">■ Enter a Payment.
		Double click the Amount Paid field.
		Save the record.
		Click Post button .