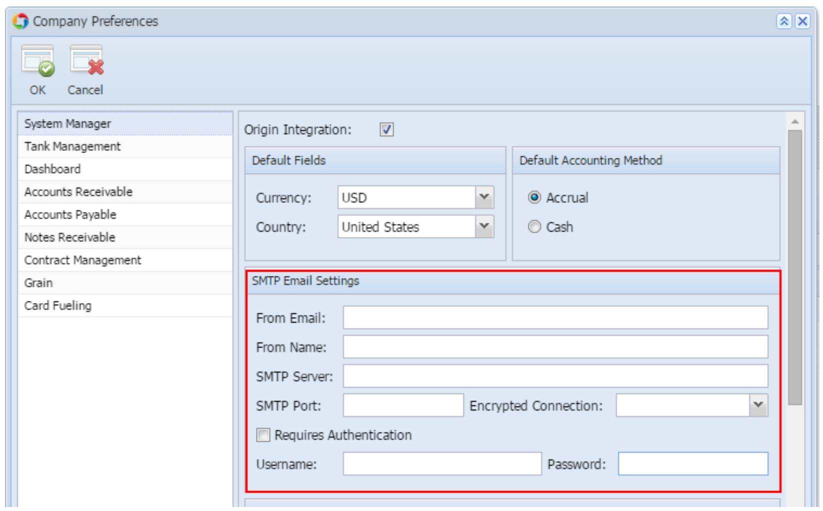
Sales Usability

Description		How To
1. Create a Customer		Go to **Sales** > **Customers**
		If the search grid is displayed, click **New button** to open a new Entity screen. ▪ Make sure Entity Type shows Customer.
		Provide the required customer details: ▪ Entity tab > **Name**, **Contact Name**, **Location Name** ▪ Customer tab > **Terms** Fill out the **Email** field. Fill out other fields on **Entity tab** and **Customer tab**, if necessary. Save the customer record.
2. Add a customer Location		Go to **Sales** > **Customers**. ▪ Open an Entity customer record, then go to **Locations tab**.
		Click **Insert button**.
		Provide the required details - **Location Name** and **Terms**. Fill out other fields if necessary. Save and close the Entity Location record.
3. Add a customer Contact		Go to **Sales** > **Customers**. ▪ Open an Entity customer record, then go to **Contacts tab**.
		Click the **Insert button**.

<table>
<tr><td></td><td></td><td>
Provide the required details - Full Name. If the Portal Access is checked, Email (username) will become a required detail.
Check the Portal Access check box
Provide the Email (username).
Fill out other fields if necessary.
Save the changes.
Click the Change Password button and enter the new contact password.
Save the changes.
Click the Email Login button to send the login credential to the contact's email add.
<u>Note</u>: For this to be successful, the System Manager > Company Preferences > SMTP Email Settings should be properly configured.


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Go to Portal Permissions tab.
Check the menus that will be accessible to the contact.
<u>Note</u>: If User Type is Admin, you can check/unchecked the Customer Contact List menu.
Save and close the Entity Contact screen.
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<tr><td></td><td></td><td>
Open the i21 login page on another tab.
Use the customer contact's credential to log on to i21.

User Name - enter the contact's Email add.
Password - enter the contact's password.
Company - enter the company where the contact belongs to.

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<tr><td>4. Create a Quote</td><td></td><td>Go to Sales > Quotes</td></tr>
<tr><td></td><td></td><td>If the search grid is displayed, click New button to open a new Quote screen.</td></tr>
<tr><td></td><td></td><td>
Provide the required details on header area - Customer, Location, Bill To, Ship To, Terms.
Fill out other header fields if necessary.
</td></tr>
<tr><td></td><td></td><td>
Add an item in the grid area.
Provide the following details - UOM, Ordered, Price.
Fill out other grid fields if necessary.
</td></tr>
<tr><td></td><td></td><td>
Set the Quote Status to Won.
Click the Process button to process this Quote to Sales Order.
Close the Sales Order screen.
</td></tr>
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5. Create a Sales Order		Go to **Sales** > **Sales Orders**
		If the search grid is displayed, click **New button** to open a new Sales Order screen.
		Provide the required details on header area - **Customer**, **Location**, **Bill To**, **Ship To**, **Terms, BOL No, Freight Terms, UOM.** Fill out other header fields if necessary.
		Add an item in the grid area. Provide the following details - **UOM**, **Ordered**, **Price**. Fill out other grid details if necessary.

		Click the **Process button** to process this Sales Order to Inventory Shipment.
		
		• <u>Note</u>:
		  ◦ 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		Go to **Sales** > **Invoices**
		If the search grid is displayed, click **New button** to open a new Invoice screen.
		Select a Customer. (If the Add Inventory Shipment screen is displayed, close it) Provide the required details on header area - **Customer**, **Location**, **Bill To**, **Ship To**, **Terms, Freight Terms.** Fill out other header fields if necessary.
		Add an item in the grid area. Provide the following details - **UOM**, **Ordered**, **Price**. Fill out other grid details if necessary.
		Save the record. Click **Post button**.
		Click the **Print button** to view the preview of the Invoice report.
		Click the **Email** > **Email Template** - this will open the Email Template screen. Provide the Email Template details. ▪ 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.
		Back to Invoice, click the **Email** > **Email Invoice button**. This will send the Invoice to the customer's primary contact. Close the Invoice screen.
7. Create a Credit Memo		Go to **Sales** > **Credit Memos**
		If the search grid is displayed, click **New button** to open a new Credit Memo screen.
		Provide the required details on header area - **Customer**, **Customer**, **Location**, **Bill To**, **Ship To**, **Terms.** Fill out other header fields if necessary.
		Add an item in the grid area. Provide the following details - **UOM**, **Ordered**, **Price**. Fill out other grid details if necessary.

		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. ▪ 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. ▪ Enter a **Payment**.
		Double click the **Amount Paid** field.
		Save the record.
		Click **Post button**.