InTempo

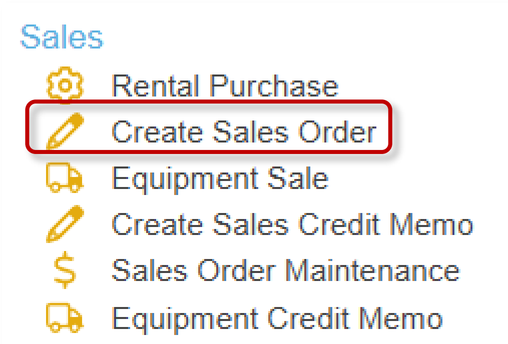
Process Documentation

Department:
Customer Support
Last Updated:
12/23/2025 11:22 AM

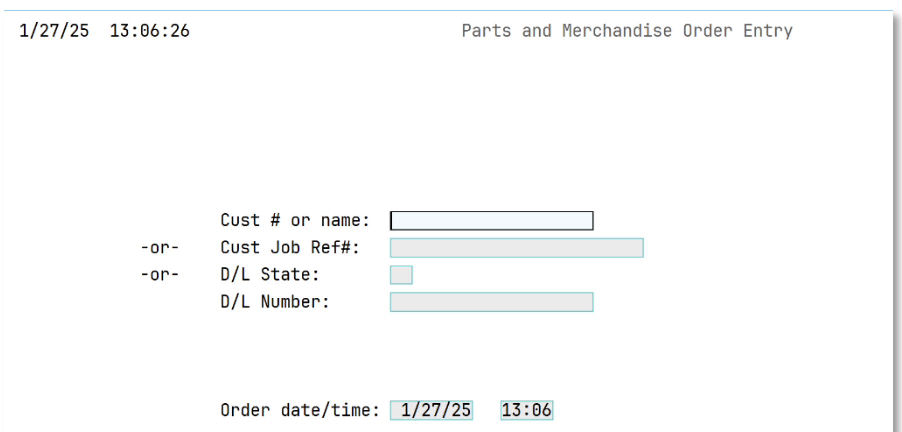
NAME OF PROCESS
Create a Sales Order [RolePlay]
Use Case / Objectives
This guide will walk you through how to create a sales order for parts and merchandise. There is also a section for [cloning a sales order]().   **Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**
Menu options to access: Main Operations => Create Sales Order

Creating a Sales Order

1. Log into the [Roleplay Environment]() using your credentials.
2. If the **Main Operations** screen is not displayed, click on the **Main Operations** menu option on the left side of the screen.
3. In the **Sales** section, click on **Create Sales Order**.

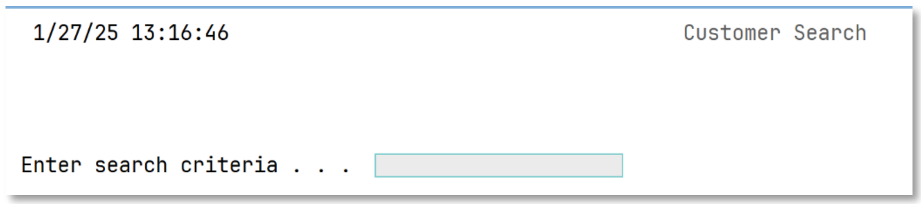


4. The **Parts and Merchandise Order Entry** screen displays. **NOTE:** the process for creating a sale order is the same regardless of whether your customer is a charge or cash customer.

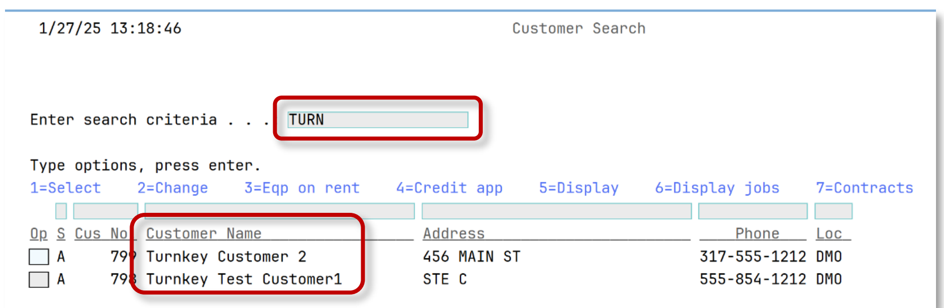


5. If you know your customer's name or number, type it in the *Cust # or name* field; press Enter.
6. If you do not know your customer's name or number, you can search in one of the following ways:
   a. F4 Function Key
   b. Partial Name
   c. First Letter

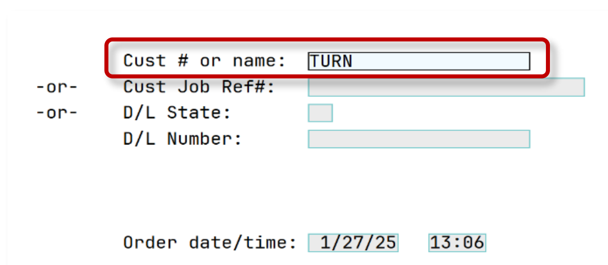
i. **F4** - With the cursor in the *Cust # or name* field, press F4 on your keyboard or click on *F04 Customer Search* in the **Display Functions** section.
   1. The **Customer Search** screen displays.



   2. Type in the *Enter search criteria* field and press Enter.
      a. The screen refreshes to display a list of customers matching the value entered.

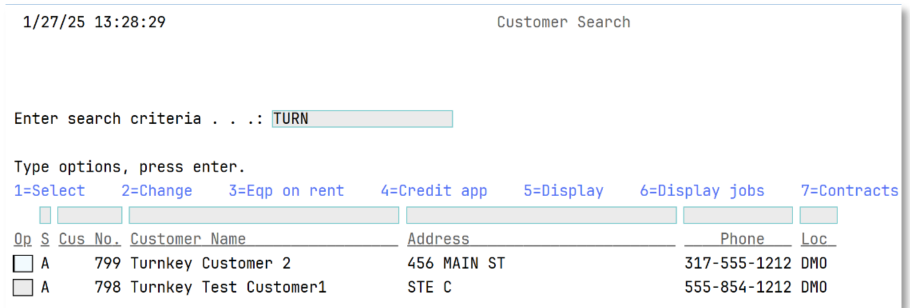


ii. **Partial Name** – press F3 on your keyboard or click on *F3 Exit* in the **Display Functions** menu to return to Parts and Merchandise Order Entry screen.
   1. With your cursor in the *Cust # or name* field, type in part of your customer's name.



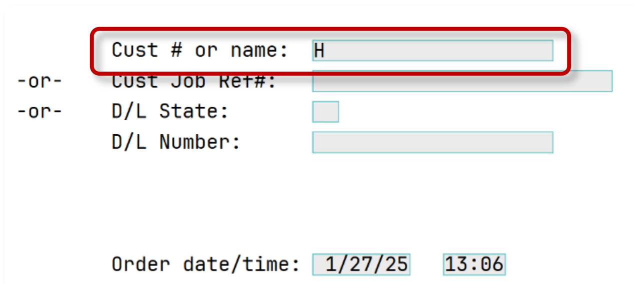
   2. Press Enter.

a. The **Customer Search** screen displays a list of customers matching the value entered.



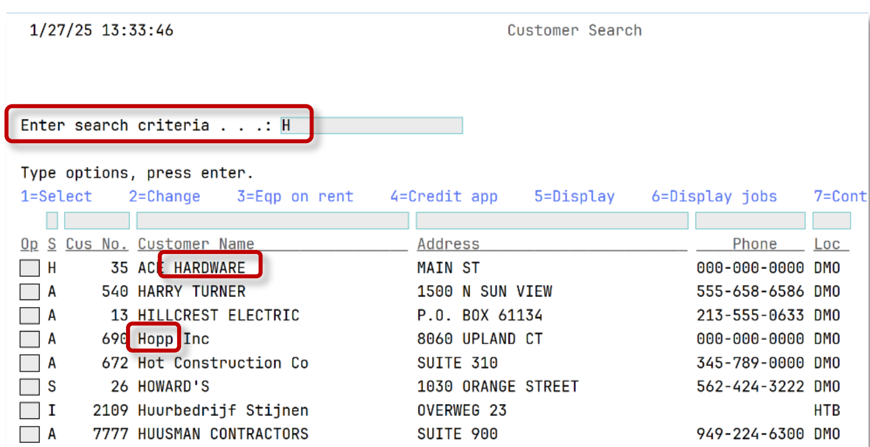
iii. **First Letter** – press F3 on your keyboard or click on *F3 Exit* in the **Display Functions** menu to return to the Merchandise Order Entry screen.

1. With your cursor in the *Cust # or name* field, type in the first letter of your customer's first or last name.

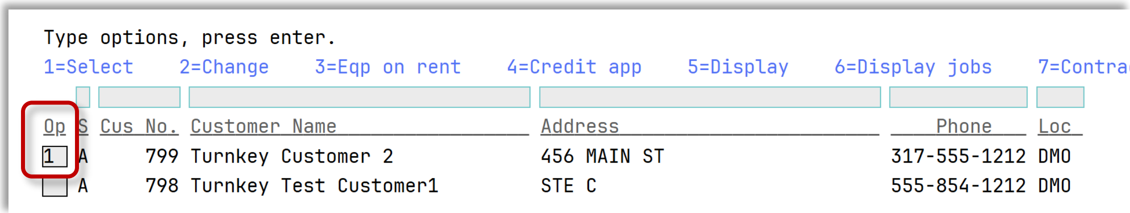


a. Press Enter.

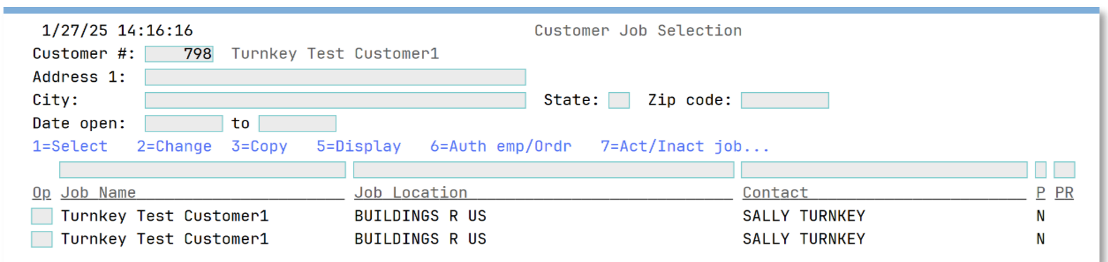
i. The **Customer Search** screen displays a list of customers whose first or last name matches the value entered.



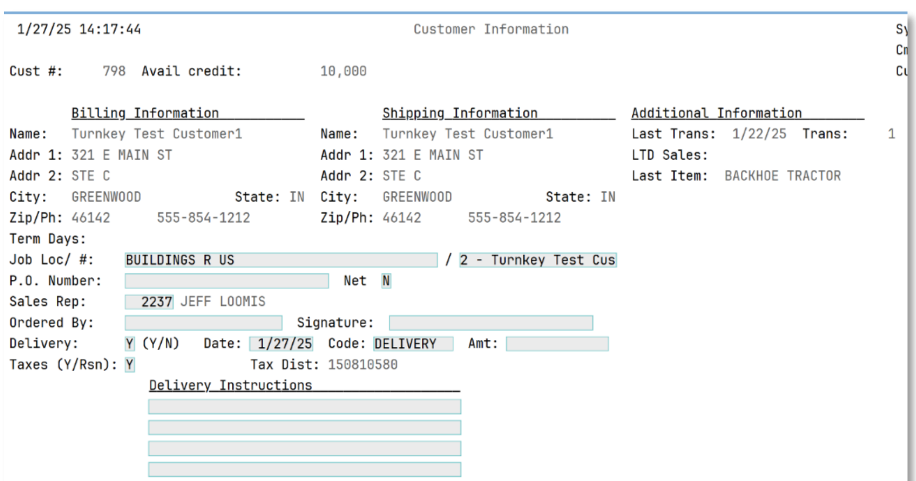
2. Regardless of the search method used, once the **Customer Search** screen displays results, type 1 in the *Op* column next to the desired customer.



3. Press Enter.
   a. The **Customer Job Selection** screen opens, displaying any jobs in the system for the selected customer.

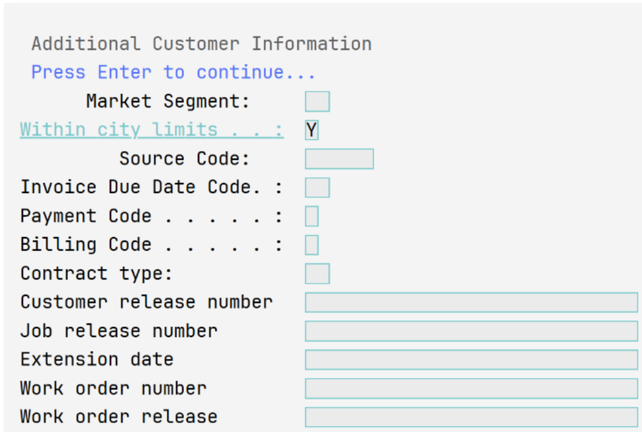


4. Type 1 in the *Op* column next to the desired Job; press Enter. **NOTE:** you can also press F6 on your keyboard or click on *F06 Add* in the **Display Functions** menu to create a new job.
   a. The **Customer Information** screen opens, displaying information for the selected Job.



5. While on the **Customer Information** screen, press F17 (shift+F5) on your keyboard or click on *F17 More Info* in the **Display Functions** menu.

a. The **Additional Customer Information** pop-up window displays.

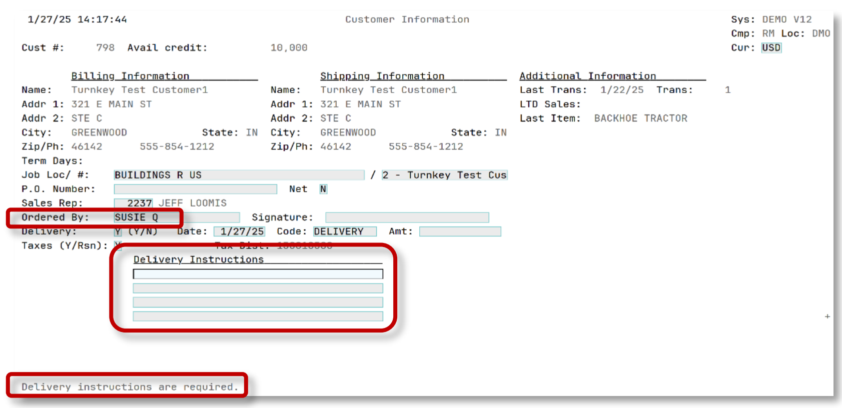


b. If desired, type in any additional information for your customer and press Enter to continue.

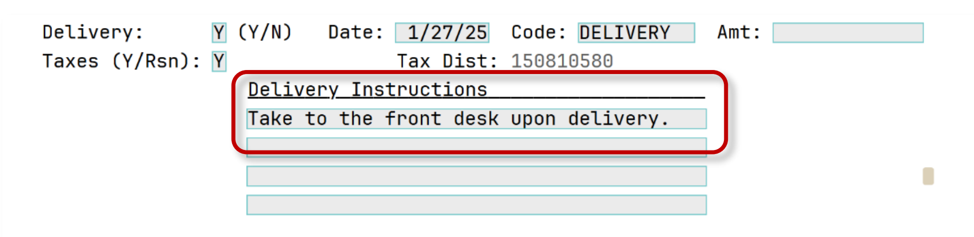
i. The **Additional Customer Information** pop-up window closes.

6. Type in the *Ordered by* field and press Enter. **NOTE:** this field's required status is dependent on whether control record **ORDREQ** is set to **Y**.

a. Value displays in the field and because *Delivery* is **Y**, the *Delivery Instructions* fields display and are required.

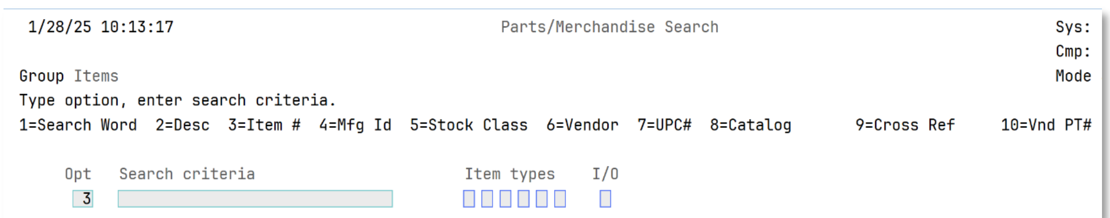


b. Either change *Delivery* to **N** or type in the *Delivery Instructions* field and press Enter. **NOTE:** the delivery flag controls how taxes are calculated. If *Delivery* = **Y**, taxes can be based on the job site. If *Delivery* = **N**, taxes will be based on the store location.

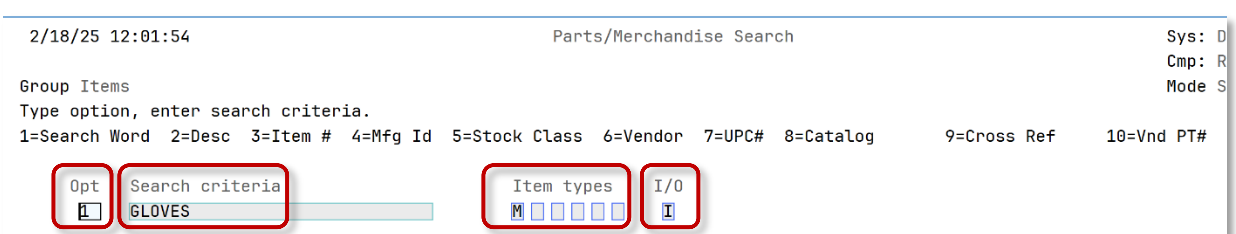


7. Review the information and press Enter.
   a. The **Item Information** screen opens.

8. If you know the *Item Number*, type it in the field and press Enter.
9. If you do not know the *Item Number,* type 1 in the *Opt* field and press Enter to search. **NOTE:** if you know part of the Item Number, type it in the *Item #* field and press Enter to open the search screen.
   a. The **Parts/Merchandise Search** screen opens.

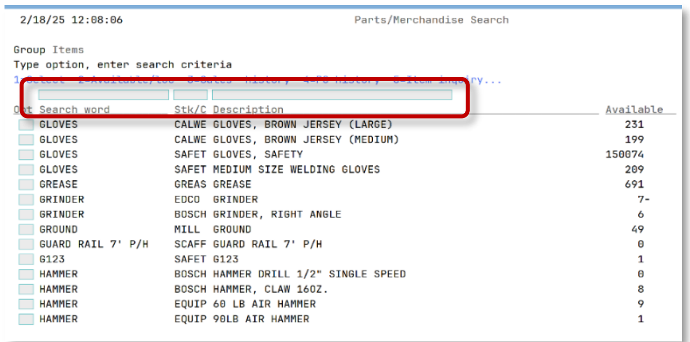


10. From here you can search on one of the following options by typing in the *Opt* field and entering a value in the *Search criteria* field:
    i. 1 = Search Word
    ii. 2 = Desc
    iii. 3 = Item
    iv. 4 = Mfg ID
    v. 5 = Stock Class
    vi. 6 = Vendor
    vii. 7 = UPC #
    viii. 8 = Catalog
    ix. 9 = Cross Ref
    x. 10 = Vnd PT#
11. You can also enter valid *Item Types* value (up to 6) and denote whether to include (I) or omit (O) that type.



   a. Press Enter.

b. The **Parts/Merchandise Search** screen refreshes to display items in the system matching the value entered.



c. You can filter the list further by <u>typing in</u> the filter fields above the *Search word*, *Stk/C*, or *Description* columns or you can <u>scroll through</u> the list until you locate the desired item.

d. <u>Type 1</u> in the *Opt* column next to the desired item and <u>press Enter</u>.

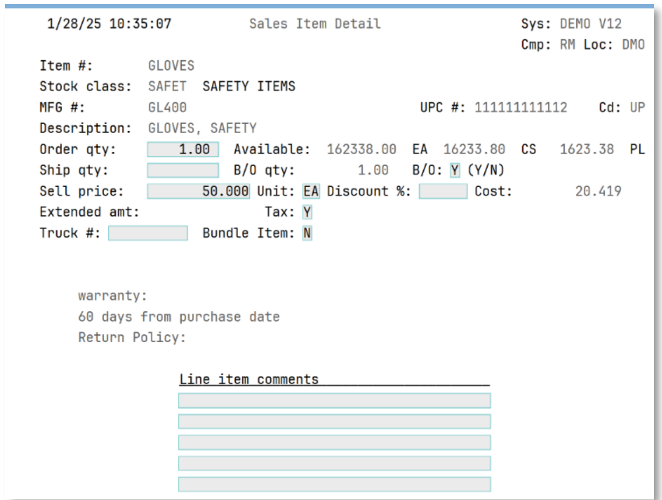
    i. The **Parts/Merchandise Search** screen closes and the Item Information screen displays.

    ii. The item selected displays in the *Item #* field, the *Reg price* and *Sold price* fields populate with data stored in the system but can be updated if necessary.

    iii. The **Suggested Items** section may populate with any additional recommended items.

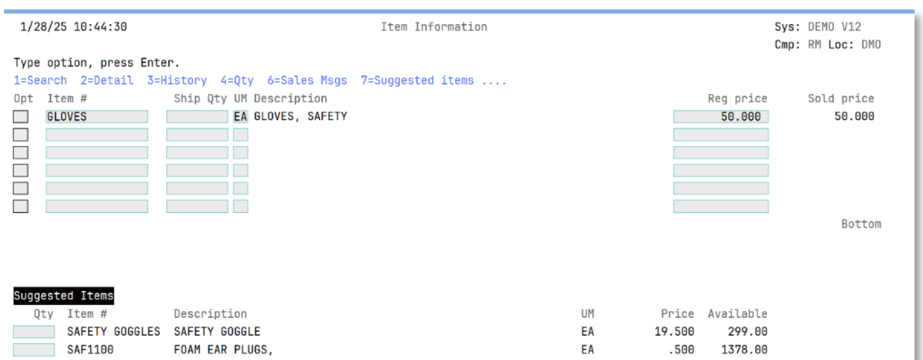
e. <u>Type 2</u> in the *Opt* field next to the item populated and <u>press Enter</u>.

i. The **Sales Item Detail** screen displays for the selected item.



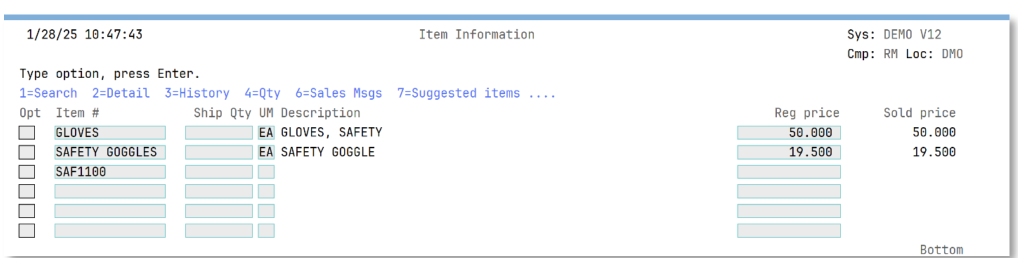
f. Make any additions or corrections and press Enter.

i. The **Sales Item Detail** screen closes and the **Item Information** screen displays.

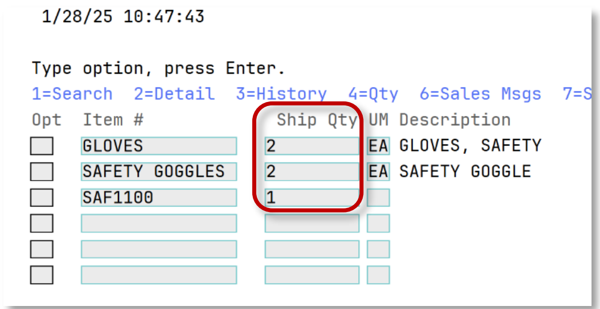


ii. Make any changes, including adding additional items or quantities for any **Suggested Items** and press Enter.

1. The Item Information screen refreshes to display any additional items.

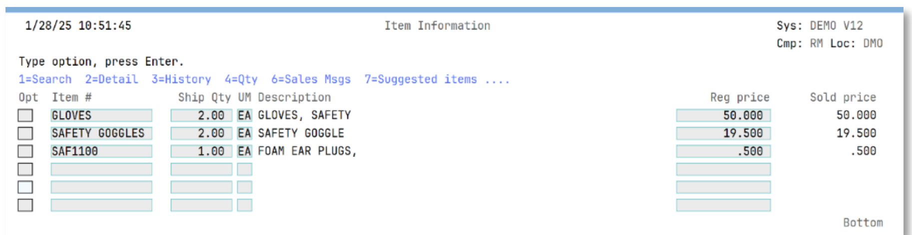


2. Type in the *Ship Qty* for each item listed.



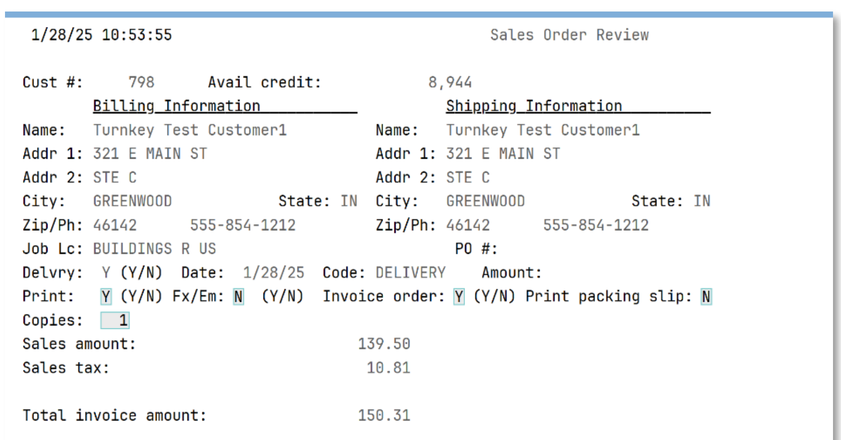
a. Press Enter.

i. Values update for the quantity and items entered.



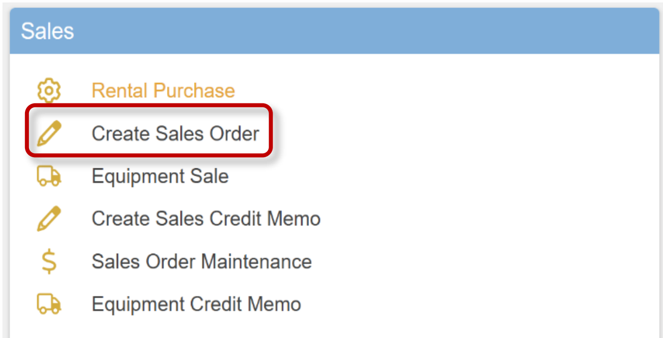
b. Review the order information and press Enter to continue.

i. The **Sales Order Review** screen displays.

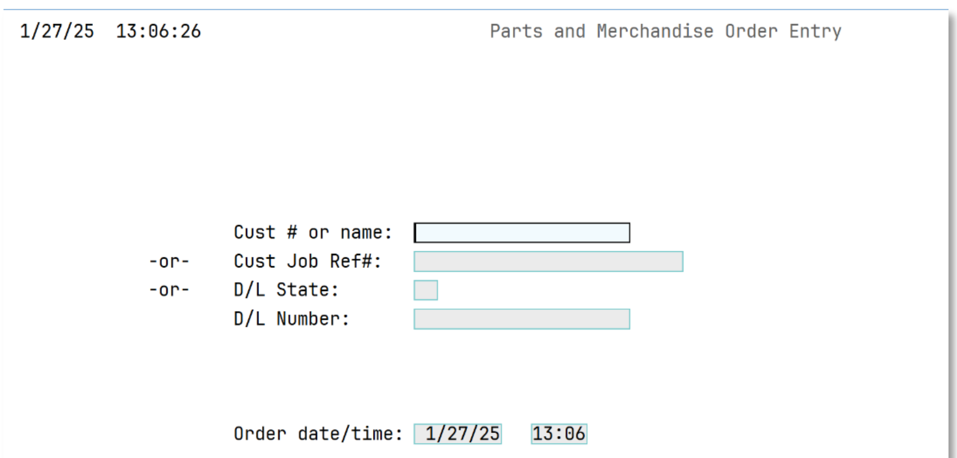


Cloning a Sales Order

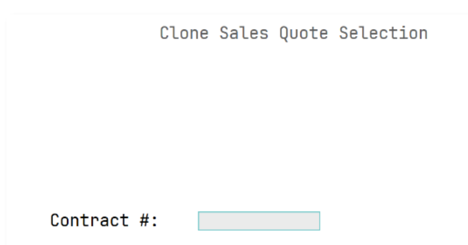
1. If the **Main Operations** screen is not displayed, <u>click on</u> the **Main Operations** menu option on the left side of the screen.
2. In the **Sales** section, <u>click on</u> **Create Sales Order**.



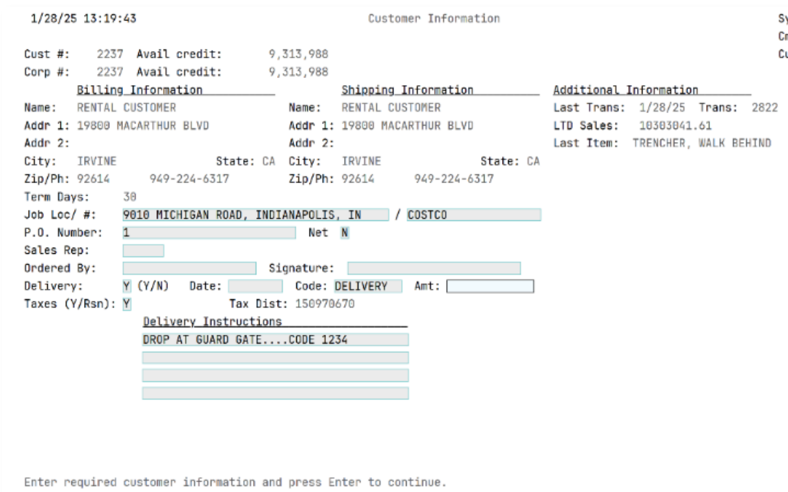
3. The **Parts and Merchandise Order Entry** screen displays. **NOTE:** fields are defined in the **Reference Glossary** below.



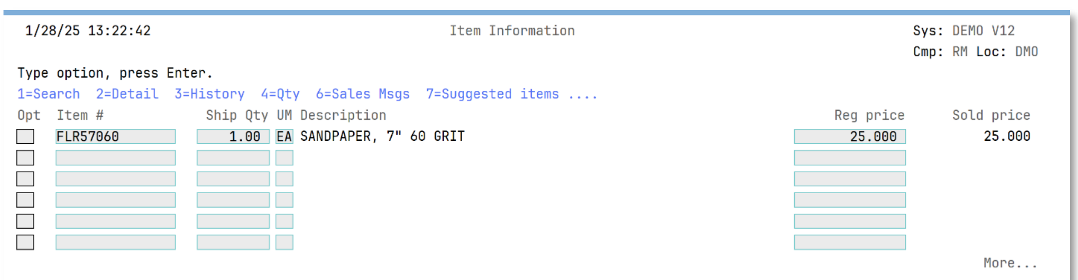
4. <u>Press shift+F2</u> on your keyboard or <u>click</u> *F14 Clone Sales Order* in the **Display Functions** section.
   a. The **Clone Sales Quote Selection** screen displays.



5. Type the contract number in the *Contract #* field and press Enter. **NOTE:** if you do not know the contract number you wish to clone, press F4 in the field to Search.
    a. The **Parts and Merchandise Order Customer Notes** screen displays.
        i. Press Enter.
            1. The **Customer Information** screen displays.



        ii. Type in required customer information and press Enter to continue.
        iii. Review and press Enter again.
            1. The **Item Information** screen displays with any items from the original Sales Order.



            2. Review the information.
            3. Add any additional items.
            4. Press Enter to continue.

a. The **Sales Order Review** screen displays.

```
 1/28/25 13:24:43                                    Sales Order Review

Cust #:    2237      Avail credit:       9,441,436
        Billing Information ______          Shipping Information ______
Name:   RENTAL CUSTOMER                 Name:   RENTAL CUSTOMER
Addr 1: 19800 MACARTHUR BLVD            Addr 1: 19800 MACARTHUR BLVD
Addr 2:                                 Addr 2:
City:   IRVINE               State: CA  City:   IRVINE               State: CA
Zip/Ph: 92614      949-224-6317         Zip/Ph: 92614      949-224-6317
Job Lc: 9010 MICHIGAN ROAD, INDIANAPOLIS, IN     PO #: 1
Delvry:  Y (Y/N)  Date:  1/28/25  Code: DELIVERY    Amount:        45.00
Print:   Y (Y/N) Fx/Em: N  (Y/N)  Invoice order: Y (Y/N) Print packing slip: N
Copies:    1                                        Proforma-Y/Invoice-N:   Y
Sales amount:                          25.00
Delivery charge:                       45.00
Sales tax:                              4.90

Total invoice amount:                  74.90
```

b. Review the information and press Enter.

c. The sales order is written and the **Main Operations** screen displays.

Reference Glossary

Field Definitions for Tasks

Parts and Merchandise Order Entry

- *Customer number or name* - If you are creating a sales order for a charge account customer, enter the account number, name, or search word of the charge customer. **NOTE:** steps to search are noted below.
- *Driver's license state* - If you are creating a sales order for a cash customer, enter the two-letter abbreviation for the state on the customer's driver's license.
- *Driver's license number* - If you are creating a sales order for a cash customer, enter the number from their driver's license.
- *Order date* - Enter or accept the date of sales order creation.
- *Order time* - Enter or accept the time of sales order creation.

Customer Information

- *Customer Number* - Displays the unique number assigned to the customer.
- *Available Credit* - Displays the amount of credit currently available to the customer. When the customer is over their credit limit, this amount displays as a negative number.
- *Corporate Number* - If applicable, this field displays the number of the corporate customer to which this customer is associated.
- *Corporate Available Credit* - If applicable, this field displays the amount of credit available for this customer including the corporate customer's available credit.
- *Currency* – Enter or accept the code for the currency to be used for the sales order.
- **Billing Information**
    - *Name* - The customer's name for billing purposes.
    - *Address 1* - Line 1 of the customer's billing address.
    - *Address 2* - Line 2 of the customer's billing address.
    - *City* - The city of the customer's billing address.
    - *State* - The state or province of the customer's billing address.
    - *Zip* - The postal code of the customer's billing address.
    - *Phone* - The customer's main billing phone number.
    - *Term Days* – displays the number of days of the standard payment term for this customer.
- **Shipping Information**
    - *Name* - The customer's name for shipping purposes. This is usually associated with the job attached to the sales order.
    - *Address 1* - Line 1 of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *Address 2* - Line 2 of the customer's shipping address. This is usually associated with the job attached to the sales order.

   - *City* - The city of the customer's shipping address. This is usually associated with the job attached to the sales order.
   - *State* - The state or province of the customer's shipping address. This is usually associated with the job attached to the sales order.
   - *Zip* - The postal code of the customer's shipping address. This is usually associated with the job attached to the sales order.
   - *Phone* - The customer's main shipping phone number.
- *Job Location/Number* - The location and the number associated with the job you selected for the sales order. You can override this information for a charge customer. If you are entering a sales order for a cash customer, you can enter information here that is not validated against the customer job file.
- *P. O. Number* - If a purchase order was entered in the selected job record, the number is displayed, but you can override it. Otherwise, you can enter the purchase order number for each sales order.
- *Net* – This field displays based on settings in **USECOD** control record. If that record is set to use the use code and you are using the use code to set net rates, the label for this field is 'Net.' If this field is 'Net,' and the value for **Net means use book rates** in the **MANDSC** control record is **Y**, you cannot change the rates on a manual contract.
- *Sales Representative* - The sales representative you want to assign to this sales order. If there is a sales representative assigned to the selected job, that representative's number displays, but it can be changed. If the selected job does not have a sales representative assigned, the information defaults from the customer master record, but it can be changed. **Note:** you can also press F4 to search for a sales representative.
- *Ordered By* - The name of the person who placed the sales order.
- *Signature* - The name of the person who signed for the equipment. **NOTE:** If the **User Auth Req** field for the customer or customer job is set to **Y**, you can press F4 here to access a list of authorized users for the customer/customer job, and you can select one of the users to populate this field.
- *Delivery* - Indicate if the items on this sales order will be delivered.
- *Delivery Date* – if the sales items are to be delivered, enter the date of delivery.
- *Delivery Code* - The code that prints on the invoice when there are delivery charges. Press F4 in this field to find and select a specific shipper/carrier for the delivery. Once selected, the carrier's name replaces the Delivery Code in the field.
- *Delivery Amount* - The amount you want to charge for delivery. This amount is billed to the customer at the time of the first invoice.
- *Taxes* - Indicates whether to charge taxes on this sales order. If you do not enter **Y**, press F4 to search for a reason code as to why items are not taxable on the order. The settings default from the selected job. Or from the customer master record if no job is selected.
- *Tax District* - The tax district code for this sales transaction. If **Delivery** is set to **Y**, the shipping information is used for tax purposes. If it is set to **N**, the tax information comes from the location creating the invoice.

- *Resale Number/VAT Number* - If the customer is tax exempt for resale reasons, this is their resale number. This should default from the customer master, but it can be changed.
- *Delivery Instructions* – Add delivery instructions for the driver or update instructions that came from the selected job. Use **F7**, **F8**, and **F9** to toggle this area to display customer comments from the customer master record, authorized users, and delivery instructions, respectively. **NOTE:** Delivery instructions will print on the rental contract.

Additional Customer Information

- *Market Segment* - Enter the code that allows you to track transactions for this customer as part of a user-defined market segment. Set up market segment codes using Default Codes in Cross Applications.
- *Within city limits* - Indicate whether the customer location is within the city limits.
- *Source/Routing Code* - Enter a code to indicate how this customer was referred to you.
- *Invoice Due Date Code* - Enter a code to indicate when invoices will be due for this customer. For example, code A3 could represent an invoice due date of 1 mo (30 days) on the 10th.
- *Payment Code* - Enter a code to indicate how this customer will pay their invoices. For example, code K could represent payment by check.
- *Billing Code* - Enter a code to indicate how this customer will be billed if they choose summary invoicing. For example, code J represents a billing type of summary invoice by job.
- *Contract Type* - If applicable, enter a code that represents the type of contract being created.
- *4 User-Defined Fields* - There may be up to 4 additional fields in this window where you can enter other user-defined information for the customer in association with this transaction. Use code UD in the Default Codes program in Cross Application Maintenance to create the headings for these fields.

Item Information

- *Item number* - Enter the unique number assigned to the item to be sold. If you do not know the number, type 1 in the *Opt* field to the left of the *Item number* field and press Enter to access Parts/Merchandise Search.
- *Ship quantity* - Enter the quantity to be shipped.
- *Unit of measure* - Enter or accept the unit of measure in which this item is being sold.
- *Description* - Displays the description of the item from the master file.
- *Regular price* - Enter or accept the retail price of the item. The default price is from the item master record, but you can change it.
- *Sold price* - Displays the price at which the item is being sold. This price reflects discounts and any changes you manually make to the regular price.

Parts/Merchandise Search

- *Search criteria* - Depending on the option you choose, enter the appropriate letters, words, or numbers to advance to the corresponding search results screen. You can also leave this field blank and just press Enter to advance to the search results screen with all records listed.
- *Item types* - Enter up to six item types that you want to either include or omit in your search.
- Item types available:
  - **P** = Parts
  - **M** = Merchandise
  - **E** = Equipment
- *Include/Omit* - Indicate whether you want to include (I) or omit (O) the item types that you listed in the field to the left.

Sales Item Detail

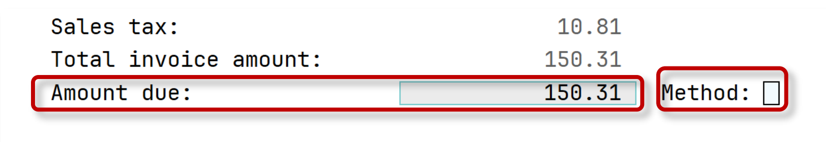
- *Item number* - Displays the unique number assigned to the item.
- *Stock class* - Displays the stock class in which the sales item falls.
- *Manufacturer's number* - Displays the manufacturer's number assigned to the item.
- *UPC number* - If applicable, this field displays the UPC number assigned to the item.
- *Code* - Displays the code associated with the UPC number. Two codes are supported; the default code is UP.
- *Description* - Displays the description of the sales or miscellaneous charge item.
- *Order quantity* - Enter or accept the order quantity for the item on the sales contract.
- *Available* - Displays the quantity available at all locations for this item in its standard unit of measure.
- *Available 2* - Displays the quantity available in a second unit of measure, if applicable.
- *Available 3* - Displays the quantity available in a third unit of measure, if applicable.
- *Ship quantity* - Enter or accept the quantity of the item that will ship.
- *Back order quantity* - If applicable, this field displays the quantity of the item that is back ordered because of insufficient inventory.
- *Back order* - Indicate if you want to create a customer back order for the back ordered quantity.
- *Sell price* - Enter or accept the selling price for the item on this sales order.
- *Unit of Measure* - Enter or accept the unit of measure for the item on this sales order. This defaults from the item master file, but it can be changed.
- *Discount percentage* - If applicable, enter the discount you are applying to this item on this sales order.
- *Cost* - Displays the item's cost so that you can compare the selling price to it.
- *Extended amount* - Displays the extended amount for this item on this sales order. This amount is calculated by multiplying the quantity times the price times the discount percentage.

- *Tax* - Indicates if the item is taxable on the sales order.
- *Tax Code* - Displays the tax (VAT) code for the item.
- *Truck number* - If applicable, enter the number of the truck from which the items will be taken to fulfill this order.
- *Line item comments* - Enter comments that print on the order/invoice under the item number. These comments are an effective way to record information for non-charge items and discounted rates.

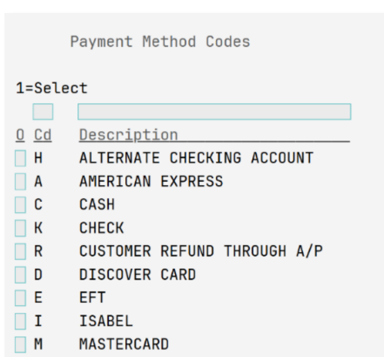
Sales Order Review

- *Customer Number* - Displays the unique number assigned to the customer.
- *Available Credit* - Displays the amount of credit currently available to the customer. When the customer is over their credit limit, this amount displays as a negative number.
- *Currency* - Displays the code for the currency to be used for the sales order.
- **Billing Information:**
    - *Name* - The customer's name for billing purposes.
    - *Address 1* - Line 1 of the customer's billing address.
    - *Address 2* - Line 2 of the customer's billing address.
    - *City* - The city of the customer's billing address.
    - *State* - The state or province of the customer's billing address.
    - *Zip* - The postal code of the customer's billing address.
    - *Phone* - The customer's main billing phone number.
- **Shipping Information:**
    - *Name* - The customer's name for shipping purposes. This is usually associated with the job attached to the sales order.
    - *Address 1* - Line 1 of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *Address 2* - Line 2 of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *City* - The city of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *State* - The state or province of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *Zip* - The postal code of the customer's shipping address. This is usually associated with the job attached to the sales order.
    - *Phone* - The customer's main shipping phone number.
- *Job Location* - The location and the number associated with the job you selected for the sales order.
- *PO Number* - If a purchase order was entered in the selected job record, the number is displayed.
- *Delivery* - Indicates if the items on the sale order will be delivered.
- *Delivery Date* - If the sales items are to be delivered, this field displays the date of delivery.

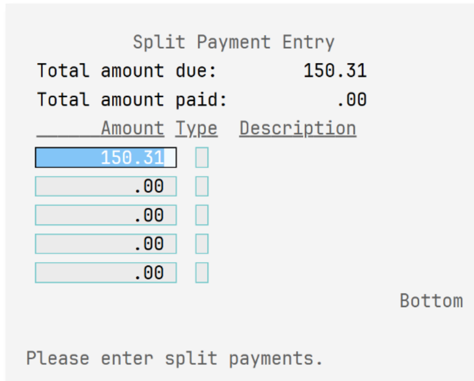
- *Delivery Code* - The code that prints on the invoice when there are delivery charges.
- *Delivery Amount* - Displays the amount you want to charge for delivery. This amount is billed to the customer at the time of the first invoice.
- *Print* - Indicate if you want to print the sales order.
- *Fax/Email* - Indicate if you want to fax and email the sales order to the customer. If you enter Y, when you press Enter to finish your review of the order, the **Fax/E-mail** Window appears.
- *Invoice order* - Indicate if you want to invoice the sales order immediately with a Y or enter N if you will invoice the order at a later time according to the customers' usual invoicing terms. If you enter Y, the sales contract number that is displayed at the top of the screen after you save the record is the sales invoice number and has a sequence of 0001.
- *Sales amount* - Displays the total amount for all items on the sales order.
- *Delivery charge* - If applicable, this field displays the charge for delivery of the sales order.
- *Sales Tax* - If applicable, this field displays the tax charged for the sales order.
- *Total invoice amount* - Displays the total amount of the sales order by adding all the amounts above this figure.
- **Accept Cash (F9):** press F9 on your keyboard or click on *F09 Accept Cash* in the **Display Functions** menu.
    - The **Sales Order Review** screen refreshes and the *Amount due* and *Method* fields display.



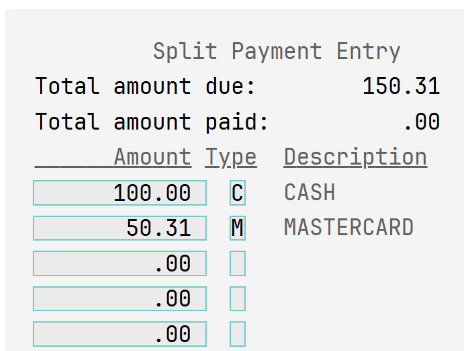
    - *Amount due* - Enter the amount you collected from the customer (by cash, check, or credit card) against the total invoice amount.
    - *Method* - Enter the code that represents the payment method for the amount you collected. If you do not know the code, position your cursor in the field and press F4 to search for it on the **Payment Method Codes** pop-up window.



- If the customer has various methods of payment for the amount due, type S. The **Split Payment Entry** pop-up window appears where you can enter multiple payment methods.



- *Total amount due* - Displays the total amount due for the contract.
- *Total amount paid* - Displays the total amount paid on the contract. This is calculated by adding **amounts** entered on the lines below.
- *Amount* - Enter the amounts for each payment type. **Example:** The total amount due on the contract is $150.31. The customer pays $100.00 by check and the remaining 50.31 on a credit card. Enter $100.00 in the first *Amount* field and $50.31 on the line below that.
- *Type* - Enter the payment type code that is appropriate for that amount. If you do not know the code, press F4 to search for it.
- *Description* - Displays a description for the payment type code.



- Verify the values; press Enter to continue.
- The **Split Payment Entry** pop-up closes and the Sales Order Review screen refreshes.

```
 1/28/25 12:34:12                                      Sales Order Review

Cust #:     798      Avail credit:             8,944
        Billing Information                         Shipping Information
Name:   Turnkey Test Customer1              Name:   Turnkey Test Customer1
Addr 1: 321 E MAIN ST                       Addr 1: 321 E MAIN ST
Addr 2: STE C                               Addr 2: STE C
City:   GREENWOOD            State: IN      City:   GREENWOOD            State: IN
Zip/Ph: 46142      555-854-1212             Zip/Ph: 46142      555-854-1212
Job Lc: BUILDINGS R US                               PO #:
Delvry:  Y (Y/N)  Date:  1/28/25  Code: DELIVERY    Amount:
Print:   Y (Y/N) Fx/Em: N  (Y/N)  Invoice order: Y (Y/N) Print packing slip: N
Copies:   1
Sales amount:                      139.50
Sales tax:                          10.81
Total invoice amount:              150.31
Amount due:                        150.31  Method: S
```

- Review and press Enter to write the contract. **NOTE:** because split payment was selected, the **Split Payment Entry** pop-up displays.

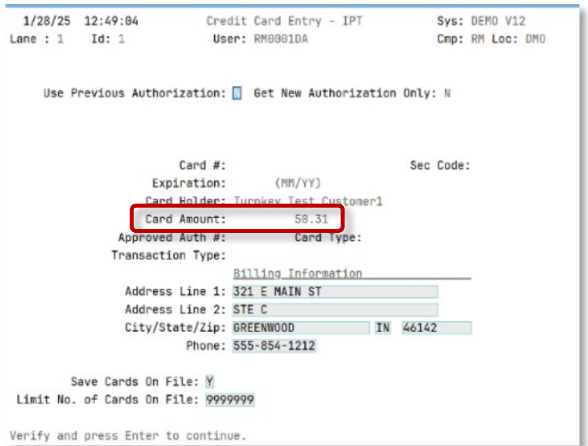
```
           Split Payment Entry
 Total amount due:          150.31
 Total amount paid:         150.31
        Amount  Type  Description
        100.00   C    CASH
         50.31   M    MASTERCARD



                                 Bottom

Please confirm split payments.
```

- Press Enter.
    - Since a credit card payment method was selected, the **Terminal Selection** pop-up displays.

```
                                   Terminal Selection

Location: DMO  - IRVINE

Type options, press ENTER.
  1=Select

           Terminal                                  IP
Opt  Type       Id.  Description                     Address            Port   Lane
     IPT   00000001  IPT-TERMINAL                                              1
     EMV   00000003  CURBSTONE PAX ISS OFFICE        192.158.1.151             2
     EMV   00000006  DEJAVOO 2012                    80852015,cLgXyAb          21
     EMV   00000004  Springfield PAX Terminal        10.80.76.230              3
     EMV   00000005  Dejavoo ISS OFFICE              80852013,cLgXyAb          4
                                                                                More...
```

    - Type 1 in the *Opt* column to select the desired Terminal; press Enter.
        - The **Terminal Selection** pop-up closes and the **Credit Card Entry** screen displays.

- The *Card Amount* entered on the previous screen displays.



- Verify the data; press Enter to continue.
- The **Credit Card Entry** screen closes and the **Review** screen refreshes.
- Review the information and press Enter to write the contract.
  - Once the contract is written, the **Main Operations** screen displays.

Clone Sales Quote Selection

- *Contract number* - Enter an existing sales contract number to clone/copy. If you do not know the number, press F4 to search for the contract.
- *Sequence number* - Enter the sequence number for the sales contract you entered in the previous field. The sequence number is a system-generated number that is appended to the contract number each time the contract is transacted. For example, when a contract is first created, the sequence number is **0000**. If you enter a transaction against the contract, such as an invoice, the sequence number increments to **0001**.