



Tekla EPM 2019

Order Entry

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1 Set up the Order Entry module

In **Order Entry Maintenance**, you can create and modify the settings used when working in the **Order Entry** module. For example, you can modify the company standard settings, invoice categories, shipping methods, and payment terms.

Remember to also set up the necessary tax rates and tax groups before you start working in the **Order Entry** module.

For more information, see the following links:

[Define company standard settings for Order Entry \(page 5\)](#)

[Create, modify, and delete charge processes \(page 11\)](#)

[Create, modify, and delete invoice categories \(page 13\)](#)

[Create, modify, and delete order and quote categories \(page 14\)](#)

[Create, modify, and delete price groups \(page 15\)](#)

[Create, modify, and delete payment methods \(page 17\)](#)

[Add, modify, and delete payment terms for customer orders \(page 18\)](#)

[Add, modify, and delete shipping methods for customer orders \(page 20\)](#)

[Create, modify, and delete territory options \(page 21\)](#)

1.1 Define company standard settings for Order Entry

You can define default settings that become the company-level standard settings used in each new order entry job. In company standard settings, you can set default price groups and price levels, credit limits, backdating settings, and QuickBooks tax codes.

To access the **Company Standards** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Order Entry --> Company Standards**.

Now, you can manage the different company-level standard settings on the different tabs of the **Company Standards** dialog box.

Remember to also set the combining optimizations, suppliers, and input and display units that are used in the **Order Entry** module by default. For more information, see:

- [Define combining optimizations for Order Entry \(page 9\)](#)
- [Define input and display units for Order Entry \(page 9\)](#)
- [Define suppliers for Order Entry \(page 11\)](#)

According to your needs, see any of the following instructions:

Define general order entry settings

1. Open the **General** tab.
2. Adjust the following options according to your needs:

Option	Description
New Customer - Default Tax Group	The default tax group applied for new order entry taxable items. The tax group can be changed job by job.
Restrict to Inventory Location	When selected, Tekla EPM limits the available stock material selection to a specific inventory location. Select the desired inventory location in the list on the right side of the field. Inventory locations can be set and reset in the Inventory module.
Allow Delivery of Un-Invoiced Material	When selected, Tekla EPM allows delivering materials before invoicing. NOTE You need to select the Allow Delivery of Un-Invoiced Material option to view and use delivery tickets before invoicing.
Allow Invoicing of Material Not Delivered	When selected, Tekla EPM allows creating invoices for materials before they are delivered.
Keep Order Selection Screen Open	When selected, the order selection dialog box stays open after a job has been selected.
Selection Screen - Default number of days to view	The number of days for which orders remain in the Order Selection dialog box. This setting allows you to filter out older orders. To always display all orders, type 0.

Option	Description
Order # Increment	The default option for automatic order numbering. New orders are numbered according to the selected option. However, you can modify the order number according to your needs each time you create a new order.
Item Increment	The numbering system for items listed in an order. Using the default auto-increment of 10 allows items to be added in the list according to your needs, without having to renumber the other items in the job.
Quote # Regular Expression and Order # Regular Expression	Optional expressions used for pattern matching.
New Material - Default Price	The default material cost applied to new quotes and orders. The options are: <ul style="list-style-type: none"> • No Default: no default price is set. • Replacement Cost: the price defined in Pricing Maintenance is used. • Inventory Average: the inventory average price is used. • Inventory High: the highest inventory price is used.
Order - Automatically Allocate Inventory	When selected, Tekla EPM automatically uses material items in the inventory for quotes and orders.

NOTE Do not click **Save** until you have modified all necessary settings. Saving the settings closes the **Company Standards** dialog box.

Define price level settings

1. Open the **Price Levels** tab.
2. In the **Number of Price Levels** field, type the number of levels of pricing that you want to use.
3. In the **Default Price Group** list, select the price group to be used by default for new orders.
4. In the **Default Price Level** list, select the price level to be used by default for new orders.

For more information on defining the pricing groups and pricing levels used in **Order Entry**, see [Create, modify, and delete price groups \(page 15\)](#).

NOTE Do not click **Save** until you have modified all necessary settings. Saving the settings closes the **Company Standards** dialog box.

Set credit limit settings

1. Open the **Credit Limit** tab.
2. In the **New Customer - Default Credit Limit** field, type the default credit limit for new customers.

If you do not want to set a credit limit, type 0.

3. Select how Tekla EPM will react when a customer has exceeded their credit limit.

The options are:

- **Allow without warning:** Tekla EPM allows creating new orders without warning
- **Allow with warning:** Tekla EPM allows creating new orders, but a pop-up warning is displayed
- **Allow with credit limit override:** Tekla EPM allows new orders when you override the customer's credit limit
- **Don't allow:** Tekla EPM does not allow any new orders for customers that have exceeded their credit limit

NOTE Do not click **Save** until you have modified all necessary settings. Saving the settings closes the **Company Standards** dialog box.

Define backdating settings

If you want to mark payments and other order entry activities as created on a previous date, you can allow back-dating for the activities.

1. Open the **Back-Dating** tab.
2. Click to select the check boxes for each option for which you want to allow back-dating order activity.

If you do not want to allow backdating, do not select any check boxes.

NOTE Do not click **Save** until you have modified all necessary settings. Saving the settings closes the **Company Standards** dialog box.

Define QuickBooks sale tax codes

If you have connected the QuickBooks accounting software with Tekla EPM, you can define the sales tax codes that are used when exporting invoices from Tekla EPM to QuickBooks.

Note that you need to have exactly the same tax codes in both software.

1. Open the **QuickBooks** tab.
2. Type in the sales tax codes used for taxable and non-taxable items.

NOTE Do not click **Save** until you have modified all necessary settings. Saving the settings closes the **Company Standards** dialog box.

Define input and display units for Order Entry

You can define the input and display units used in the **Order Entry** module.

1. At the bottom of the **Company Standards** dialog box, click **Input/Display Units**.
2. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.

Note that there are multiple options depending on the required precision and the desired input method.

3. Click **OK**.
4. Remember to click **Save** in the **Company Standards** dialog box to update the input and display units.

See also

[Define company standard settings for Order Entry \(page 5\)](#)

Define combining optimizations for Order Entry

You can define company-level settings for multing and plate nesting in the **Order Entry** module. These settings define which combining methods are utilized and in which order. You can combine, save, and compare various combining run options until the desired result is achieved.

1. At the bottom of the **Company Standards** dialog box, click **Combining Setup**.
2. To use material grade substitutions with the optimization settings when performing a combining run, on the **General Settings** tab of the **Combining Setup** dialog box, select the **Use Grade Substitutions** check box.

Grade substitutions must be set in the **Shape / Grade / Size Maintenance** dialog box. If the grade substitutions are not set, the material grades in the combining run and in the supplier pricing data set or the inventory need to match each other exactly.

3. Click the arrow buttons to move the optimization options that you want to use to the **Optimizations Included** list.

The options are:

- **Inventory Exact-Match (In Stock):** Use this option for inventory items in stock that are an exact match without the use of kerf or clamp allowance.
- **Inventory Exact-Match (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that are an exact match without the use of kerf or clamp allowance.
- **Inventory Least-Scrap (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that will provide the least amount of scrap.
- **Inventory Least-Scrap (In Stock):** Use this option for inventory items in stock that will provide the least amount of scrap.
- **Warehouse Least-Scrap:** Use this option to give preference to warehouse items that will provide the least amount of scrap. Warehouse items will only be used when they provide less scrap than the available inventory items.
- **Warehouse Force Inventory:** Use this option to force the use of inventory regardless of the amount of scrap, no matter where it is located in the **Optimizations Included** list. This option is the opposite of **Warehouse Least-Scrap**.

Note that you can only include **Warehouse Least-Scrap** or **Warehouse Force Inventory**, not both.

4. Use the **Move Up** and **Move Down** buttons to modify the order of the optimizations.

The order is important while performing a combining run.

5. Open the **Plate Nesting Settings** tab.

6. In the **Shear Cut Optimization** list, click a suitable shear cut option to select it.

The selected option determines the plate allowance to be used with the combining:

- Use **None** when cutting plate on a burn table.
 - Use **Shear Cut - First Cut Along Length** or **Shear Cut - First Cut Along Width** to alert Tekla EPM that the nesting needs to allow for that type of cut first. Then, the nesting will allow for all subsequent cuts to be made with that condition.
7. If the material grain direction is unimportant and you want Tekla EPM to create the best possible optimization of a plate, select the **Rotate Plates for Best Fit** check box.
 8. Click **Save**.
 9. Remember to click **Save** in the **Company Standards** dialog box to save the combining optimizations.

See also

[Define company standard settings for Order Entry \(page 5\)](#)

Define suppliers for Order Entry

You can define the desired suppliers, or pricing data sets, for angles, beams, plates, rods, tubes, and other material. This way, you can use material pricing from the selected supplier pricing data sets for each material group.

1. In the **Company Standards** dialog box, click the **Suppliers** button.
2. In the **Suppliers** dialog box, click the arrows on the right side of the material group lists, and select the suppliers.
3. Click **OK**.
4. Remember to click **Save** in the **Company Standards** dialog box to update the supplier settings.

See also

[Define company standard settings for Order Entry \(page 5\)](#)

1.2 Create, modify, and delete charge processes

While working in **Order Entry**, you should use different charge processes depending on whether you are charging the customer for material, labor, or both. The charge processes, standard charges, and applicable costs are defined in **Charge Process Maintenance**.

NOTE While working on quotes and orders in the **Order Entry** module, you can only change the price per item, not the type or description. This means that you can enter the base costs in the **Charge Processes** dialog box and change them according to your needs.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Order Entry --> Charge Process Maintenance**.

3. In the **Charge Processes** dialog box, do any of the following:

To	Do this
Add a new charge process	<ol style="list-style-type: none"> a. Click New. b. In the Type list, select a suitable option. The options are Material, Labor, and Miscellaneous. Use the Miscellaneous option when the charge applies to both material and labor.

To	Do this
	<p>c. In the Description field, type a description for the charge process.</p> <p>For example, if the Type is Labor, the description can be <i>Cutting or Welding</i>.</p> <p>The description will appear in the Process column in Order Entry.</p> <p>d. In the Cost field, type the price per item.</p> <p>e. Click Add to save the new charge process and add it to the list.</p>
Modify a charge process	<p>a. Select a charge process in the list.</p> <p>b. Modify the type, description, and cost according to your needs.</p> <p>c. Click Edit to save the changes.</p>
Delete a charge process	<p>a. Select a charge process in the list.</p> <p>b. Click Delete.</p> <p>c. To permanently delete the charge process, click Yes in the confirmation dialog box.</p>

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.3 Create, modify, and delete invoice categories

In the **Invoice Category Maintenance** dialog box, you can create a list of standard invoice categories used for customer orders. The categories that you define are available when creating invoices in the **Order Entry** module.

- Click the **Maintenance** ribbon tab.
- In the menu, select **Order Entry --> Invoice Category Maintenance**.
- In the **Invoice Categories** dialog box, do any of the following according to your needs:

To	Do this
Add a new invoice category	<p>a. Click New.</p> <p>b. In the Category field, type a name for the invoice category.</p> <p>c. In the Description field, type a description for the invoice category.</p>

To	Do this
	d. Click Add to save the new invoice category and add it to the list.
Modify an invoice category	a. Select the invoice category that you want to modify. b. Modify the name and description of the invoice category. c. Click Save to save the changes.
Delete an invoice category	a. Select the invoice category that you want to delete. b. Click Delete . c. To permanently delete the invoice category, click Yes in the confirmation dialog box.

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.4 Create, modify, and delete order and quote categories

In the **Order Category Maintenance** dialog box, you can create a list of standard categories for orders and quotes. For example, you can create separate order categories for walk-in customers and regular customers. The categories that you define are available in the **Order** dialog box for both quotes and orders.

- Click the **Maintenance** ribbon tab.
- In the menu, select **Order Entry --> Order Category Maintenance**.
- In the **Order Categories** dialog box, do any of the following according to your needs:

To	Do this
Add a category	a. Click New . b. In the Category field, type a name for the category. c. In the Description field, type a description for the category. d. Click Add to save the new category and add it to the list.
Modify an order category	a. Select the order category that you want to modify.

To	Do this
	<ul style="list-style-type: none"> b. Modify the name and description of the selected order category. c. Click Save to save the changes.
Delete a category	<ul style="list-style-type: none"> a. Select the category that you want to delete the list. b. Click Delete. c. To permanently delete the category, click Yes in the confirmation dialog box.

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.5 Create, modify, and delete price groups

You can add, modify, and delete price groups that are available in the **Order Entry** module. You can also define different price levels within price groups. Price levels determine the level of markup that your company gets from each order. Note that you can use any price level with any price group.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Order Entry --> Price Group Maintenance**.

Price Group Maintenance

Price Group: Customer A, **Default**

Description: Default

By Weight: ☐

	Minimum Order Price	Markup %
Price Level 1:	\$0.00	0.00%
Price Level 2:	\$0.00	0.00%
Price Level 3:	\$0.00	0.00%
Price Level 4:	\$0.00	0.00%
Price Level 5:	\$0.00	0.00%
Price Level 6:	\$0.00	0.00%
Price Level 7:	\$0.00	0.00%
Price Level 8:	\$0.00	0.00%
Price Level 9:	\$0.00	0.00%

New (F1) Save (F4) Delete (F2)

3. In the **Price Group Maintenance** dialog box, do any of the following according your needs:

To	Do this
Add a price group	<p>a. Click New.</p> <p>b. In the Description field, type a description for the price group.</p> <p>c. To add price levels to the price group, type the desired minimum order prices and markup percentages in the available fields.</p> <p>The minimum order prices and markups are used for recovering costs and small orders. As orders get larger, the amortization of costs may set off the need for larger markups and allow smaller minimum order prices.</p> <p>d. Click Add to save the price group and add it to the list.</p>
Modify a price group	<p>a. Select the price group that you want to modify.</p>

To	Do this
	<ul style="list-style-type: none"> b. Modify the description and price levels according to your needs. c. Click Save to save the changes.
Delete a price group	<ul style="list-style-type: none"> a. Select the price group that you want to delete. b. Click Delete. c. To permanently delete the price group, click Yes in the confirmation dialog box.

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.6 Create, modify, and delete payment methods

You can add, modify, and delete payment method options available for new payments in the **Order Entry** module. You can also select which payment method you want to use as the default option used for new orders.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Order Entry --> Payment Method Maintenance**.
3. In the **Payment Method Maintenance** dialog box, do any of the following according to your needs:

To	Do this
Add a new payment method	<ul style="list-style-type: none"> a. Click New. b. In the Description field, type a description for the payment method. For example, <i>Cash</i>. c. Click Add. <p>The new payment method is saved and added to the list.</p>
Set a payment method as default	<ul style="list-style-type: none"> a. Select the payment method that you want to set as the default option. b. Click Set as Default. c. To confirm using the selected payment method as the default option, click Yes. <p>The default payment method is marked with an asterisk (*). This payment method will be used by default for new orders.</p>

To	Do this
Modify a payment method	<ol style="list-style-type: none"> Select the payment method that you want to modify. Modify the description of the payment method. Click Edit to save the changes.
Delete a payment method	<ol style="list-style-type: none"> Select the payment method that you want to delete. Click Delete. To permanently delete payment method, click Yes.

- To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

1.7 Add, modify, and delete payment terms for customer orders

You can add, modify, or delete the payment term options that are available for all customer orders created in **Order Entry**. In addition, you can set the default payment term that will be used for new customer orders.

- Click the **Maintenance** ribbon tab.
- In the menu, select **Order Entry --> Payment Term Maintenance**.

Payment Term Maintenance

* - Default Payment Term

Payment Term ▲	Discount	Credit Hold if Past Due	Days To Past Due ▲
2%-10/net 30	2.00%	No	
5%-10/net 30	5.00%	No	
10%-10/net 30	10.00%	No	
C.O.D.	0.00%	No	
* Cash	0.00%	No	
Check	0.00%	No	
Credit Card	0.00%	No	
Net 15 days	0.00%	Yes	0
Net 30 days	0.00%	Yes	1

Description:

Discount:

Credit Hold if Past Due: ☒

Days to Past Due:

3. In the **Payment Term Maintenance** dialog box, do any of the following according to your needs:

To	Do this
Add a new payment term	<ol style="list-style-type: none"> Click New. In the Description field, type a description for the payment term. If necessary, in the Discount field, type a discount percentage for the payment term. If you want to freeze a customer's credit when an invoice is past the due date, select the Credit Hold if Past Due check box. In the Days to Past Due field, type the number of days that an invoice can be past due date before the customer's credit is frozen. Click Add to save the new payment term and add it to the list.

To	Do this
Set a default payment term	<ol style="list-style-type: none"> Select the payment term that you want to set as the default option. Click Set as Default. To confirm using the selected payment term as the default option, click Yes in the confirmation dialog box. <p>The default payment term is marked with an asterisk (*). This payment term will be used by default for new customer orders.</p>
Modify a payment term	<ol style="list-style-type: none"> Select the payment term that you want to modify. Modify the payment term properties according to your needs. Click Edit to save the changes.
Delete a payment term	<ol style="list-style-type: none"> Select the payment term that you want to delete. Click Delete. To permanently delete the payment term, click Yes in the confirmation dialog box.

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.8 Add, modify, and delete shipping methods for customer orders

In the **Shipping Method Maintenance** dialog box, you can add, modify, and delete shipping method options that are available for the customer orders created in **Order Entry**. You can also select which shipping method you want to use as the default option.

- Click the **Maintenance** ribbon tab.
- In the menu, select **Order Entry --> Shipping Method Maintenance**.
- In the **Shipping Method Maintenance** dialog box, do any of the following according to your needs:

To	Do this
Add a shipping method	<ol style="list-style-type: none"> Click New. In the Description field, type a description for the new shipping method.

To	Do this
	c. Click Add to save the new shipping method and add it to the list.
Set a default shipping method	a. Select a shipping method in the list. b. Click Set as Default . c. To confirm using the selected shipping method as the default option, click Yes in the confirmation dialog box. The default shipping method is marked with an asterisk (*). This shipping method is used by default in the Order Entry module.
Modify a shipping method	a. Select a shipping method in the list. b. Modify the information in the Description field. c. Click Edit to save the changes.
Delete a shipping method	a. Select a shipping method in the list. b. Click Delete . c. To permanently delete the shipping method, click Yes in the confirmation dialog box.

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

1.9 Create, modify, and delete territory options

In **Territory Maintenance**, you can add, modify, and delete territory options that are available for defining order information.

- Click the **Maintenance** ribbon tab.
- In the menu, select **Order Entry --> Territory Maintenance**.
- In the **Territories** dialog box, do any of the following according to your needs:

To	Do this
Create a new territory	a. Click New . b. In the Territory field, type a name for the territory. c. In the Description field, type a description for the territory.

To	Do this
	d. Click Add to save the new territory and add it to the list.
Modify a territory	a. Select the territory that you want to modify. b. Modify the name and description of the territory according to your needs. c. Click Save to save the changes.
Delete a territory	a. Select the territory that you want to delete. b. Click Delete . c. To permanently delete the territory, click Yes in the confirmation dialog box.

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

2 Create and manage customer orders

Use the **Order Entry** module to directly sell material from your inventory. In **Order Entry**, you can create and manage customer orders, quotes, invoices, payments, credits, deliveries, and returns.

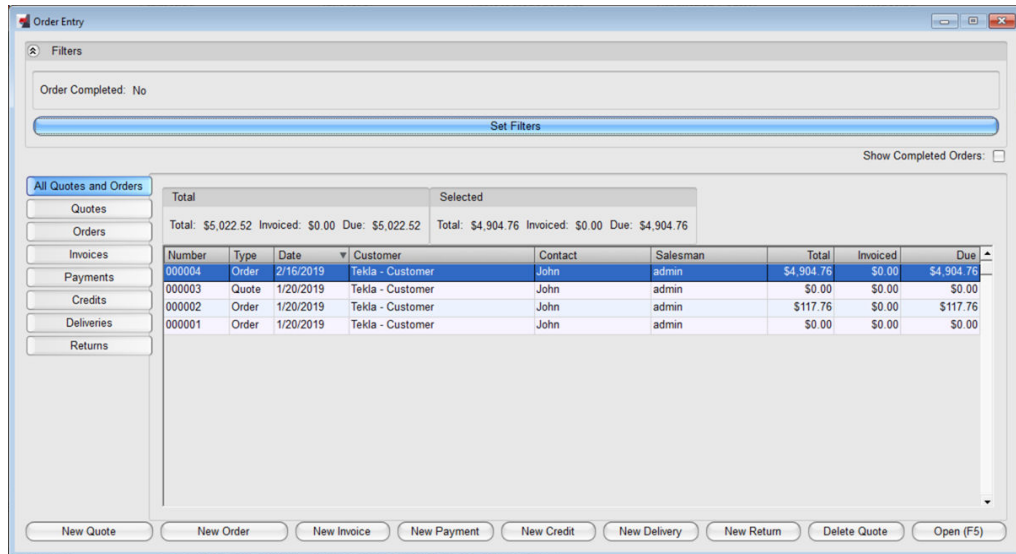
The basic workflow in the **Order Entry** module is as follows:

1. Do one of the following:
 - Create a quote or a quick quote for the customer, and once it gets accepted, convert it into an order.
 - Create an order.
2. Add details for the order.
3. Combine and allocate the material items in the order.
4. If necessary, add charges or order-specific credit for the customer.
5. Add invoices and deliveries.
6. If necessary, add returns.

2.1 Open the Order Entry module

In the **Order Entry** module, you can create, modify, and delete orders, quotes, invoices, payments, credits, deliveries, and returns. To open the **Order Entry**, do the following:

1. In the upper-right corner of the Tekla EPM window, click the **Order Entry** icon.

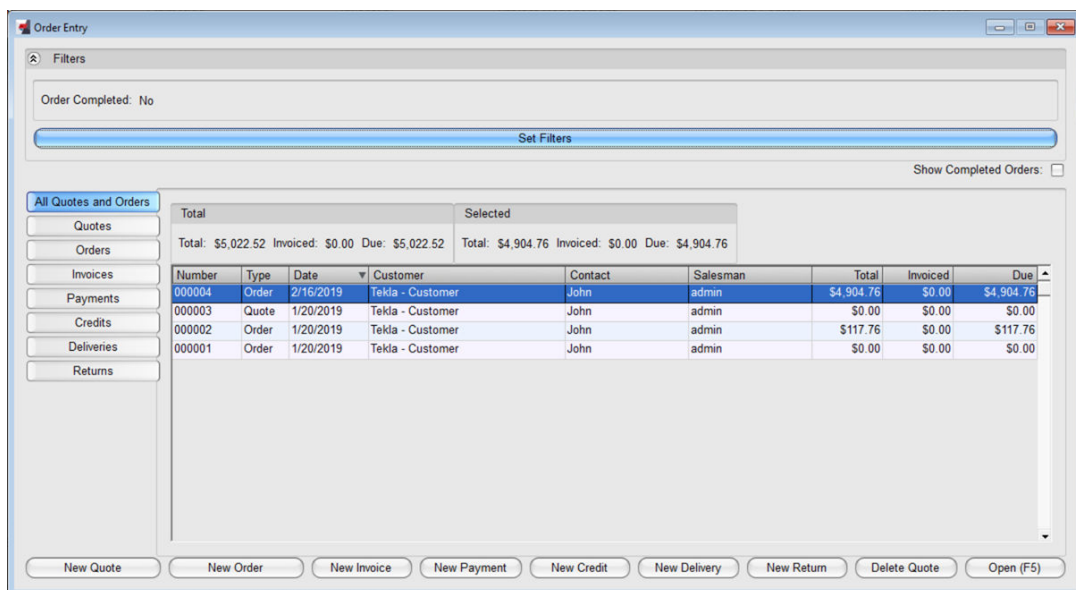


The **Order Entry** dialog box appears. You can view the existing quotes, orders, invoices, payments, credits, deliveries, and returns.

By default, the orders and quotes are visible for 30 days after their creation. However, you can [change this setting in the dialog box \(page 5\)](#) or [use filters to view older quotes and orders \(page 24\)](#).

2.2 Filter the order entry information

You can select which orders and quotes you want to see in the **Order Entry** dialog box. For example, you may want to view older orders that are hidden in the initial view of the **Order Entry** dialog box.



1. At the top of the **Order Entry** dialog box, click the arrow button on the left side of **Filters**.

The **Filters** section expands.

If you want to see all orders created in the **Order Entry** module including the completed orders, select the **Show Completed Orders** check box on the right side of the **Order Entry** dialog box.

2. To apply a new filter, click **Set Filters**.

The **Order Filters** dialog box opens.

3. Depending on what you want to filter out, click one of the available filter buttons.
4. Click the arrow buttons to move the items that you want to display to the **Included** list.
5. Click **OK**.
6. Click **Apply Filter**.

The orders and quotes displayed in the **Order Entry** dialog box are updated to match the filters you set.

To clear the applied filters, close and re-open the **Order Entry** dialog box.

2.3 Create a quote or an order

Quotes and orders are created in the exact same way. Orders can be invoiced and their materials can be sent to purchase orders, whereas quotes are simply price estimates that the customer can accept or decline. Alternatively, you can also create quotes in the **Inventory** module.

1. At the bottom of the **Order Entry** dialog box, click **New Quote** or **New Order**.

2. If necessary, modify the quote or order number at the top of the **Order Information** dialog box.
3. Enter a job description and the eventual customer purchase order number.
4. In the **Salesman** list, select the salesman.
All users listed in the **Administration** dialog box are available in the **Salesman** list.
5. Select the quote or order date and the delivery date.
6. In the **Customer Name** list on the **Customer/Terms/Settings** tab, select a company.
All companies in the address book whose firm type is **Customer** are available in the list. When you select the company, the default shipping and billing addresses and the customer code are automatically added to the dialog box. If necessary, you can select an alternative shipping or billing address in the appropriate lists.
7. In the **Contact** list, select a contact person associated with the customer company.

TIP You can also add a contact person into the address book in the current dialog box. Type a new name in the **Contact** field and click the **Add** button that has appeared on the right side of the field. Then, enter the contact information for the new contact person.

8. Select the tax group, order category, territory, shipping method, payment terms, price group, and price level in the appropriate lists.

9. In the **Item Increment** field, type a value used for numbering materials in the quote or order.

Using the default auto-increment of 10 allows items to be added in the list according to your needs, without having to renumber the other items in the job.

10. To limit the available stock material selection to a certain inventory location, select the **Restrict to Inventory Location** check box, and select the inventory location in the list.
11. If necessary, you can click the buttons on the right to modify the [input and display units \(page 9\)](#), [combining optimizations \(page 9\)](#), and [suppliers \(page 11\)](#) of the current quote or order.
12. Go to the **Notes** tab to add notes regarding the quote or order.
The notes will appear in quote and order reports.
13. Go to the **Internal Notes** tab to add private notes regarding the quote or order.
14. At the bottom of the dialog box, click **Save Quote Information** or **Save Order Information**.

The quote or order is created and added to the **Order Entry** dialog box. You can modify all properties later, if necessary.

The **Details** dialog box opens. You can add quote or order details regarding, for example, materials, charges, and discounts.

See also

[Add quote or order details \(page 27\)](#)

[Create a quick quote \(page 36\)](#)

[Copy quote or order information \(page 35\)](#)

Add quote or order details

Once you have created a quote or an order, you need to add details for it. This includes adding materials to be delivered to the customer, creating additional charges, and adding the necessary discounts. For orders, you can also add invoices, payments, credit, deliveries, and returns.

To access the **Details** dialog box, do one of the following:

- In the **Quote** dialog box, click **Quote Details**.
- In the **Order** dialog box, click **Order Details**.

The **Details** dialog box opens on the **Total** tab, where all quote or order details and job activity are shown.

Details - Order #: 000004 - OVER CREDIT LIMIT

Invoices: \$6,844.76	Payments: \$1,500.00	Credits: \$0.00	Deliveries: 0#	Returns: 0#
Total: \$6,844.76	Material: \$4,904.76	Allocation: 100.00%	Charges: \$2,000.00	Discounts: \$60.00

		Total
Material:	\$4,904.76 18,315#	\$4,904.76
Cancelled (-):	\$0.00 0#	\$4,904.76
Allocated - In Stock:	0.00% 0#	
Allocated - On Order:	0.00% 0#	
Allocated - Requisition:	0.00% 0#	
Allocated - NP:	100.00% 18,315#	
Not Allocated:	0.00% 0#	
Additional Charges (+):	\$2,000.00	\$6,904.76
Discounts (-):	\$60.00	\$6,844.76
Tax (+):	\$0.00	\$6,844.76
Terms Discount (-):	\$0.00	
Total:		\$6,844.76

	Remaining
Invoiced: \$6,844.76	\$0.00
Cancelled: \$0.00	
Delivered: 0#	18,315#
Returned: 0#	
Payments: \$1,500.00	\$5,344.76
Credits: \$0.00	

See also

[Add an invoice \(page 38\)](#)

[Add a payment \(page 40\)](#)

[Add a credit \(page 40\)](#)

[Add a delivery \(page 41\)](#)

[Add a return \(page 42\)](#)

Add and combine materials

Note that even though you can allocate the material items on a quote, the material items on the quote are actually combined only when you convert the quote into an order. When a quote is converted into an order, the allocated material items of the quote are automatically reflected to the order.

1. Open the **Material** tab.

The screenshot shows a software window titled 'Details - Order #: 000004 - OVER CREDIT LIMIT'. At the top, it displays financial summary: Invoices: \$6,844.76, Payments: \$1,500.00, Credits: \$0.00, Deliveries: 0#, Returns: 0#. Below this, a bar shows Total: \$6,844.76, Material: \$4,904.76, Allocation: 100.00%, Charges: \$2,000.00, and Discounts: \$60.00.

A table lists materials with columns: Item #, Qty, Shape, Dimensions, Length, Grade, Weight, Base, Each, Total, Tax. Item 1 is selected, showing Qty 1, Shape W, Dimensions 21 x 333, Length 55'-0", Grade A992, Weight 18,315.00#, Base \$26.78/CWT, Each \$4,904.76, Total \$4,904.76, and Tax Yes.

Below the table, a detailed view for Item 1 is shown. It includes fields for Item # (2), Qty (1), Shape (W), Dimensions (21 x 50), Grade (A992), and Length (40'-0" / 16'). It also shows Base Price (\$26.78/CWT), Additional Drop Price Each (\$0.00), and a checked 'Taxable' checkbox. A 'Comment' field is present.

To the right, a 'This Item' section shows Cost (\$4,761.90) and Charge (\$4,904.76). A 'Totals' section shows Material (\$4,761.90), Charges (\$0.00), Sub-Total (\$4,761.90), Current Margin (45%), and Target Margin (3%).

At the bottom, there's a 'Markup' section with options: Replacement (checked), INV Avg, INV High, and Actual. It shows Unit Cost (\$26.78/CWT), Extended Cost (\$535.60), and Date Modified (2/9/2019). Buttons for 'New (F1)', 'Add (F4)', 'Copy (F3)', 'Delete (F2)', and 'Cancel' are at the very bottom.

2. To add materials to the list, click **New**.
3. Define the properties of the new material according to your needs:
 - a. Enter the item number, quantity, length, base price, and additional drop price per item.
 - b. In the **Shape**, **Dimensions** and **Grade** lists, select the desired options.
 - c. If the item is taxable, select the **Taxable** check box.
 - d. If necessary, type a piece mark for the material.
Adding piece marks can be useful if drawings are available.
 - e. If necessary, enter any comments regarding the part you are adding.
The comments will be visible in both the material list and reports.
 - f. To apply markup for the available costs, select the **Markup** check box.

Note that you do not need to select the **Markup** check box if you want to use the replacement cost as markup.

- g. Select the desired pricing option, and click **Apply**.
- h. To confirm the markup, click **Yes** in the confirmation dialog box.
4. Click **Add**.

Repeat steps 2 to 4 to add all necessary materials.

Note that as you add materials to the order or quote, the **Material** tab is updated to show the total cost of the material.

5. To allocate the items, do any of the following:

To	Do this
Automatically combine the material items and move them to allocation	<ol style="list-style-type: none"> Click the Order Entry ribbon tab. In the menu, select Quick Combine. When you select Quick Combine, the combining is performed according to the combining optimizations set for Order Entry. If you want to manually modify the combining setup, select Combine instead. When Tekla EPM has finished the combining process, the Combining Run Results dialog box opens. Review the combining results to make sure that they are satisfactory, and click Save Combining Run. To close the Combining Run Results dialog box, click the Close button (X) in the upper-right corner.
Allocate a material item from the inventory	<p>Material items can be allocated from the inventory if there is an exact match for the items in stock. If there is no exact match for the material item in the inventory, you need to send the item to a purchase order. For more information, see Send material items to purchasing (page 34).</p> <ol style="list-style-type: none"> Select the desired material item. In the list in the lower-right corner of the dialog box, select an inventory item that matches the selected material item. Click Allocate Inventory. To confirm allocating the material item from the inventory, click Yes in the confirmation dialog box.
Allocate a material item as an order to length item	<ol style="list-style-type: none"> Select the desired material item. At the bottom of the dialog box, click Allocate Order to Length. To confirm allocating material item as an order to length item, click Yes in the confirmation dialog box.

As you combine or allocate materials, the **Allocation** tab is updated to show the percentage of materials that has been allocated.

- To set the additional drop price per piece, select the item and click the **Set** button in the **This Item** section of the dialog box.

- To manually set the markup for the current margin, click the **%** button and select an option in the context menu.

Modify the properties of allocated materials

- Open the **Allocation** tab.

Details - Order #: 000004 - OVER CREDIT LIMIT

Invoices: \$6,844.76 Payments: \$1,500.00 Credits: \$0.00 Deliveries: 0# Returns: 0#

Total: \$34,463.80 Material: \$24,523.80 Allocation: 66.67% Charges: \$10,000.00 Discounts: \$60.00

Type	Qty	Shape	Dimensions	Length	Grade	Weight	Cuts	Drop
Inventory	1	HSS	3/4 x 3/4 x 1/8	10'0	A500-GR.B	0.00#	0 0'-0	
	\$25.00/CWT				No			
Not Purchased	3	W	21 x 333	60'0	A992	59,940.00#	1 5'-0	
	\$30.00/CWT				No			
Drop								

Buttons: Split, Join, Verify, Delete (F2), Set Price, Send to PUR

The allocated material items and the restock lengths are displayed.

- Do any of the following according to your needs:

To	Do this
Split an allocated material record	<p>Use the Split command to separate a certain quantity of pieces from an allocation record, so that you can handle it differently from other material. For example, you can set a different price for the separated quantity.</p> <ol style="list-style-type: none"> Select the material record that you want to split. Click Split. In the Enter Value dialog box, type the quantity that you want to separate. Click OK. <p>The split quantity is added to the list of allocated material records.</p>

To	Do this
Join allocated material records	<p>The Join command is used to re-join a split allocation record.</p> <p>Note that if you have made changes to one of the split records, you cannot join the records back together unless you change the properties back.</p> <ol style="list-style-type: none"> Select the material items that you want to join. To select multiple items, hold down Ctrl. To select a range of subsequent items, hold down Shift. Click Join. <p>The split material records are joined back together.</p>
Ensure that the allocated materials are available in the inventory	<ul style="list-style-type: none"> Click Verify.
Delete an allocated material record to re-combine them	<ol style="list-style-type: none"> Select the material record that you want to delete. Click Delete. To confirm deleting the materials from the Allocation tab, click Yes in the confirmation dialog box. <p>You can now re-combine the items on the Material tab.</p>
Set price for an allocated material record	<ol style="list-style-type: none"> Select the material record whose price you want to modify. Click Set Price. In the Enter Value dialog box, define a new price for the material item. Click OK.
Send an allocated material record to purchasing	See Send material items to purchasing (page 34) .

Add charges

1. Open the **Charges** tab.

2. At the bottom of the dialog box, click **New Charge**.
3. Select a date for the new charge.
4. Enter the quantity of charges.
5. If necessary, select the material item to which the new charge is applied.
Note that selecting the material item is optional. You can cancel any charges for which you have not selected a material item.
6. Select the type of charge and the charge process.
The available charge processes are defined in **Charge Process Maintenance**. For more information, see [Create, modify, and delete charge processes \(page 11\)](#).
7. Enter the amount of money per charge.
The amount will be multiplied by the quantity of charges.
8. If necessary, click to select the **Taxable** check box.
9. Click **Add Charge**.
The charge is added for the material item and will be visible in the total sum of the quote or order.

NOTE To modify or delete the existing charges, click to select the charge and click either **Edit Charge** or **Delete Charge**.

Add discounts

If necessary, you can create discounts for an individual quote or order.

1. Open the **Discounts** tab.

Date	Type	Qty	Invoiced	Can	Discount Amount	Pre-Tax
2/26/2019	Material	2	0	0	\$5.00	Yes

Date: 2/26/2019
Quantity: 2
Type: Material
Discount Amount Each: \$5.00
Pre-Tax: ☒

New Discount (F1) Edit Discount (F4) Delete Discount (F2) Cancel

2. At the bottom of the dialog box, click **New Discount**.
3. Select a date for the new discount.
4. Enter the quantity of discounts.
5. Select the charge type to which the discount is applied.
The options are **Material**, **Labor**, and **Miscellaneous**.
6. Enter the amount of money per discount.
The amount will be multiplied by the quantity of discounts.
7. If the discounts will be considered before the deduction of taxes, select the **Pre-Tax** check box.
8. Click **Add Discount**.
The discount is added for the charge type and will be visible in the total sum of the quote or order.

Send material items to purchasing

Use the **Send to PUR** command to send material items on customer orders to the **Purchasing** module. If you want to create invoices for materials that are not allocated in the inventory, send the materials to a purchase order. If you

need to request quotes for materials, you should send the materials to a requisition.

Note that materials that are on a quote cannot be sent to a purchase order.

1. Open the order and click **Order Details**.
2. In the **Details** dialog box, open the **Allocation** tab.
3. Select the material item that you want to send to purchasing.
Note that only material items whose type is **Not Purchased** can be sent to purchasing.
4. At the bottom right corner of the dialog box, click **Send to PUR**.
A dialog box opens, asking if you want to send the material to a requisition or a purchase order.
5. Select either **Requisitions** or **Purchase Orders**.
6. Double-click the purchase order or requisition to which you want to send the material.

The materials are sent to the selected requisition or purchase order.

You can view and modify the requisition or purchase order in the **Purchasing** module. If you have create an invoice for the materials in the **Order Entry** module.

See also

[Add quote or order details \(page 27\)](#)

[Add an invoice \(page 38\)](#)

Copy quote or order information

Once you have existing quotes and orders in the **Order Entry** dialog box, you can use them as the basis of new quotes and orders. You can then further modify the quote or order details according to the customer's needs. This can be useful when a customer makes an order that is similar to a previous one.

1. In the **Order Entry** dialog box, select the quote or order that you want to use as the basis of the new quote or order.
2. Click the **Order Entry** ribbon tab.
3. In the menu, select **Copy Quote/Order**.
4. To confirm copying information from the selected quote or order, click **Yes** in the confirmation dialog box.
5. Adjust the quote or order information and details according to your needs.
6. At the bottom of the dialog box, click **Save Quote Information** or **Save Order Information**.

See also

[Create a quote or an order \(page 25\)](#)

[Add quote or order details \(page 27\)](#)

Create a quick quote

Quick quotes allow you to quickly enter line items for a quote or an order. You can then either save the line items to an existing quote or order, or create a new quote or order containing the line items.

You can also create quick quotes in the **Inventory** module by clicking the **Inventory** ribbon tab and selecting **Order Entry --> Quick Quote**.

1. In the **Order Entry** dialog box, click the **Order Entry** ribbon tab.
2. In the menu, select **Quick Quote**.
3. In the **Quick Quote** dialog box, select the customer and contact.
4. Determine the quantity of items, the shape, dimensions, grade, length, and the base price.

Once you have selected the shape, grade, and dimension, you can select the item from existing inventory items.

5. If the item is taxable, select the **Taxable** check box.
6. To apply markup to the item you created, select the **Markup** check box.
7. Do one of the following:
 - To save the item to an existing quote or order, click **Save to Quote/Order**, and double-click the desired quote or order.
 - To create a new quote or order, click **Save to New Quote** or **Save to New Order**, and enter the quote or order information and details.

See also

[Add quote or order details \(page 27\)](#)

[Create a quote or an order \(page 25\)](#)

2.4 Modify a quote or an order

You can modify all order and quote properties afterwards. For example, you may need to change the customer information, the quote or job number, the tax group and rate used, and the input and display units used.

1. In the **Order Entry** dialog box, select the order or quote and click **Open**.

Order Information

Order #: 000005 Quote #: 000005 Job Description: Example job Customer PO #: 12345 Salesman: Administrator Quote Date: 2/24/2019 Order Date: 2/26/2019 Delivery Date: 3/14/2019

Customer/Terms/Settings Notes Internal Notes

Customer Name: Tekla - Customer Customer Code: Tekla

Ship To: Default - Shipping Attn: Bill Address: 6704 Tarpley's Tavern Rd City: Williamsburg State: VA Zip: 23188

Bill To: Default - Mailing Attn: Todd Address: 1075 Big Shanty Road NW Ste 175 City: Kennesaw State: GA Zip: 30144

Contact: John Phone: 757-645-0842 Mobile Phone: Fax: Pager: Email:

Tax Group: NONE Tax Rate: Material: 0.00% Labor: 0.00% Miscellaneous: 0.00%

Category: Territory: Input/Display Units

Shipping Method: Counter Pickup Combining Setup

Payment Terms: Net 15 days Suppliers

Price Group: Default Price Level: 1 0.00%

Item Increment: 1

Order Completed: ☐ Restrict to Inventory Location: ☐

Save Order Information

2. Modify the customer information, tax groups, notes, and other information according to your needs.
3. To save the changes, click **Save Quote Information** or **Save Order Information**.

2.5 Convert a quote into an order

Converting quotes into orders is necessary in order to send materials to purchase orders, add invoices for them, and add credit payments.

1. In the **Order Entry** dialog box, select the quote and click **Open**.
2. In the lower-right corner of the **Quote** dialog box, click **Convert to Order**.
3. To confirm converting the quote into an order, click **Yes** in the confirmation dialog box.

The quote is converted into an order, and it will no longer appear in the list of quotes. Note that the dialog box name changes into **Order**.

See also

[Convert an order back into a quote \(page 37\)](#)

[Modify a quote or an order \(page 36\)](#)

2.6 Convert an order back into a quote

In Tekla EPM, you cannot delete orders. However, you can convert an order back into a quote and delete the quote. To convert the order into a quote, do the following:

1. In the **Order Entry** dialog box, click to select the order and click **Open**.
2. In the lower-right corner of the **Order** dialog box, click **Convert to Quote**.
3. To confirm converting the order back into a quote, click **Yes** in the confirmation dialog box.

The order is converted back into a quote, and it will no longer appear in the list of orders. Note that the name of the dialog box changes into **Quote**.

See also

[Modify a quote or an order \(page 36\)](#)

2.7 Delete a quote

You can delete rejected and unnecessary quotes from the **Order Entry** dialog box.

NOTE Orders cannot be deleted. To delete an order, you first need to convert the order into a quote. For more information, see [Convert an order back into a quote \(page 37\)](#).

1. In the **Order Entry** dialog box, select a quote.
2. At the bottom of the dialog box, click **Delete Quote**.
3. To permanently delete the selected quote, click **Yes** in the confirmation dialog box.

2.8 Add an invoice

After you have created a customer order and allocated the material items on the order, you can create invoices for the order. Tekla EPM then allows you to view the created invoice as a report, print it, and send it to the customer.

1. Do one of the following:
 - At the bottom of the **Order Entry** dialog box, click **New Invoice**, and double-click the order for which you want to add the invoice.
 - In the **Details** dialog box, go to the **Invoices** tab, and click **New Invoice**.

2. In the **New Invoice** dialog box, select the invoice date and invoice category.

The available invoice categories are created in the **Invoice Categories** dialog box that you can access via **Maintenance --> Order Entry --> Invoice Category Maintenance**.

3. On the **Material** tab, select whether you want to invoice all material or the material that is in stock.

TIP If you want to invoice only a certain quantity of materials, type the quantity in the **Invoice Qty** field.

4. On the **Charges** and **Discounts** tabs, select which charges and discounts are applied to the current invoice.

5. If necessary, type notes for the invoice.

The notes will be visible in the invoice.

6. Click **Add Invoice**.

If you typed a value in the **Deliver Qty** field, Tekla EPM asks you to confirm the delivery and materials.

7. In the confirmation dialog box, click **Yes**.

8. In the **Report Selection** dialog box, double-click **Invoice** to view the invoice that you just created.

After creating the invoice, you can send it to the customer via Microsoft Outlook email. To do so, click **Email Excel** or **Email PDF** in the upper-right corner of the **Tekla EPM Report Viewer**.

You can also export the invoice to an external accounting software, if necessary. For more information, see [Export invoices to accounting software \(page 39\)](#).

Export invoices to accounting software

If you have connected an accounting software with Tekla EPM, you can export any invoices created in the **Order Entry** module to the accounting software. By exporting the invoices to your accounting software, you can make sure that all invoices are found in the same location. Invoices can be exported to either QuickBooks, Timberline, or Peachtree.

1. On the left side of the **Order Entry** dialog box, click **Invoices**. The **Order Entry** dialog box only shows the existing invoices.
2. If you only want to export certain invoices, select them in the **Order Entry** dialog box.
3. Click the **Order Entry** ribbon tab.

4. In the menu, select **Export**, and select a suitable export option. You can export either all invoices visible in the **Order Entry** dialog box or the invoices that you have selected.
5. If you are exporting the invoices to Timberline or Peachtree, enter the necessary details. For example, you may need to define the job name or the date format.
6. Click **Export**.

The invoices are exported to the selected accounting software.

2.9 Add a payment

Once you receive a payment from a customer, remember to add the payment for their order in the **Order Entry** module. When you record the payments to Tekla EPM, it is easier for all Tekla EPM users to stay up to date on customer orders.

1. Do one of the following:
 - In the **Order Entry** dialog box, click **New PaymentNew Payment**, and double-click the order for which you want to add the payment.
 - In the **Details** dialog box, go to the **Payments** tab, and click **New Payment**.
2. Select the payment date and payment method.
3. Enter the amount paid by the customer.

You can see the remaining amounts to be invoiced and paid on the right side of the dialog box.
4. If necessary, add notes for the payment.

The notes will be visible in the **Payment Details** report.
5. Click **Add Payment**.

The **Report Selection** dialog box opens. If you want to view the payment information, double-click **Payment Details**.

See also

[Add an invoice \(page 38\)](#)

2.10 Add a credit

If necessary, you can add an additional credit for the customer regarding a specific customer order. Order-specific credits can be added regardless of the customer's credit limit.

1. Do one of the following:
 - In the **Order Entry** dialog box, click **New Credit**, and double-click the order for which you want to add the credit.
 - In the **Details** dialog box, go to the **Credits** tab, and click **New Credit**.
2. Select the credit date and credit method.
3. Enter the amount of credit that you want to add for the customer.
4. If necessary, add notes on the credit.
5. Click **Add Credit**.

Depending on the credit limit of the customer and the payments that are due, confirmation dialogs may open.

6. If necessary, confirm that you want to add the current credit.

The credit is added for the customer, and the **Report Selection** dialog box opens.

If you want to view the credit information, double-click **Payment Details** and review the payment detail report.

2.11 Add a delivery

You can create deliveries for both quotes and orders. In order to create a delivery, you need to determine the delivery date, quantity to deliver, shipping method, and receiver.

1. At the bottom of the **Order Entry** dialog box, click **New Delivery**.
 - In the **Order Entry** dialog box, click **New Delivery**, and double-click the order for which you want to add the delivery.
 - In the **Details** dialog box, go to the **Deliveries** tab, and click **New Delivery**.
2. In the **Delivery Date** list, select a date.
3. Do one of the following:
 - To deliver a certain quantity of material, in **Qty to Deliver**, type the quantity.
 - To deliver all material in stock, click **Deliver All - In Stock**.
4. Select a shipping method for the delivery.
5. In the **Received By** field, type the name of the receiver.
6. If necessary, add delivery notes.
7. At the bottom of the dialog box, click **Add Delivery**.

8. To continue, click **Yes** in the confirmation dialog box.
The **Report** dialog box opens, and the delivery information is added to the selected quote or order.
9. To close the dialog box, click the **Close** button (X) in the upper-right corner.

2.12 Add a return

If the customer returns some or all of the delivered materials in a customer order, we recommend that you add a return. By recording the return in Tekla EPM, you can ensure that the stock information is up to date and that other Tekla EPM users are also aware of the return.

1. Do one of the following:
 - At the bottom of the **Order Entry** dialog box, click **New Return**, and double-click the order for which you want to add a return.
 - In the **Details** dialog box, go to the **Returns** tab, and click **New Return**.
2. Select the return date.
3. Enter the quantity of material to return and the restock and replace information.
4. In the **Returned By** field, type the name of the returner.
5. If necessary, add notes about the return.
6. At the bottom of the dialog box, click **Add Return**.
7. In the **Report Selection** dialog box, do one of the following:
 - View or print the return report.
 - To close the dialog box, click the **Close** button (X) in the upper-right corner.

The new return is added for the selected quote or order.

2.13 Create order or quote reports

You can create an order and quote report, view it, and email or print it for the customer.

NOTE The **Report Selection** dialog box automatically shows only the reports for the section of **Order Entry** dialog box in which you are working. To

see a list of all reports, click **Edit Report Types** and move all reports to the **Included** list.

1. In the **Order Entry** dialog box, select a quote or an order.
2. Click the **Order Entry** ribbon tab.
3. In the menu, select **Reports**.
4. In the **Report Selection** dialog box, select a report.
5. According to your needs, do any of the following:

To	Do this
View the report	<ul style="list-style-type: none">• At the bottom of the dialog box, click View. The report opens in the Tekla EPM Report Viewer. You can print, export, and email reports also in the Tekla EPM Report Viewer dialog box.
Print the report	<ol style="list-style-type: none">a. Use the + and - signs to modify the print quantity.b. If necessary, modify the printer options on the right side of the dialog box.c. At the bottom of the dialog box, click Print.d. Select the printer that you want to use.e. Click OK.
Export the report	<ol style="list-style-type: none">a. At the bottom of the dialog box, click Export. The Export Options dialog box opens.b. Select the export file format in the list.c. To change the pre-defined file location and name, click Browse, make the changes, and click Save.d. To email the exported file to a customer or other person via Microsoft Outlook, select the Attach to Email check box.e. To open the exported file after the export, select the Open Exported Document check box.f. Click Export.

6. To close the dialog box, click the **Close** button (X) in the upper-right corner.

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