The order entry process begins by selecting the type of order - Stock Order, Quote, Credit Memo, Direct Ship, etc and then choosing a customer and job if required from drop down lists. Defaults for the customer's terms, salesperson, zone and ship via will be filled along with their balance, aging and credit limit remaining if desired.

In addition, delivery instructions can be entered for this job and will be printed on each delivery ticket for this job to ensure that the drivers find the job site along with any special instructions requested.
The “selling net available” stock for this product is computed and displayed.

If desired, the gross profit per line item & for the total order are displayed.

Stock# HP2000 is selected and a quantity of 1 is entered. Pricing for this product is shown along with an extension of the amount - $2,690.00. Cost will show is the operator is allowed to see cost.

As line items are entered, the following information is displayed - Description of the item, Item price (which may be specific to this customer and/or job), Product category, Taxable flag and Cost (if you wish it to be displayed). Comment lines may be entered as well as line item notes if necessary.

The order total in dollars and weight will accumulate as additional lines are entered.
The above order has 4 line items plus a “comment line” (please cover mortar). The total of all lines in dollars and weight is displayed at the bottom. In addition the gross profit margin % is shown if desired.

The operator can easily make changes to any line item entered by selecting that line and adjusting quantities, prices, etc as needed.
CREDIT CARD - if this customer wants to pay with a credit card, the Credit Card Payments option can be selected and the system will obtain authorization and approval from this screen.

SIGNATURE CAPTURE - utilizing a signature pad attached to the PC, the person's signature can be captured at the time of pick up and it will be stored with the order. The signature can be viewed and/or printed as needed to confirm who picked up the order.

---

### Order Entry Totals Screen - Credit Cards & Signature Capture

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Unit</th>
<th>Price</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>HP2000 Heat Pump</td>
<td>1</td>
<td>EACH</td>
<td>1641.00</td>
<td>1641.00</td>
</tr>
<tr>
<td>VESTAIRE GRILL/DUCT</td>
<td>3</td>
<td>EA</td>
<td>11.25</td>
<td>33.75</td>
</tr>
<tr>
<td>WISCONSIN AIR FILTER</td>
<td>1</td>
<td>EA</td>
<td>21.95</td>
<td>21.95</td>
</tr>
<tr>
<td>DELIVERY TICKET IN GRILL</td>
<td>1</td>
<td>EA</td>
<td>2690.00</td>
<td>2690.00</td>
</tr>
</tbody>
</table>

Total: $2,970.08

Commission: $.00
Gross Margin [%]: 38.81
Order Cost: 1,730.73
Pre-Authorized Amount: $.00

Reference: BANK JOB
Terms: CREDIT CARD

---

Signature: [Signature]

[Image of the software interface showing the order entry totals screen with credit card and signature capture options.]
Serial Number Tracking - if you want to track the serial numbers of products sold, there is an option to “Select Numbers” when the order is entered or the numbers can be selected later. The serial number needs to be selected before the order can be invoiced.

In this example the options was selected and the available serial numbers are displayed. The number(s) for this order is selected and is moved to the “Selected” column. Inquires are available by product and serial number to show when a particular serial number was sold and which customer bought it.
This “Management Dashboard” will display for users whose password is set accordingly. Up to six windows can be displayed as shown above. The fields in blue provide a hot link to the associates document or report. For example, orders that do not meet a minimum order % will display on the dashboard along with the margin for that order. By simply clicking on that order#, integraERP will display the details of the order and line items as shown below. This will prevent situations where the wrong price may have been given for a product.
Deciding which products need to be ordered and in what quantities is greatly simplified by utilizing the Purchase Order Replenishment Worksheet in integraERP. This sample worksheet is for a single product GIANT-TYPE-S, and the system is suggesting it be reordered because:

<table>
<thead>
<tr>
<th>Qty On-Hand</th>
<th>Re-Order point</th>
<th>Suggested Order Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>210</td>
<td>299 (line point)</td>
<td>165</td>
</tr>
</tbody>
</table>

This data is displayed along with the product across the worksheet. The user can either accept or modify the quantity suggested by integraERP. The worksheet can be run for multiple ranges, such as product number, vendor, product line, product class, warehouse, etc. Releasing the worksheet creates Purchase Orders within integraERP.

If this vendor has defined minimums or targets that you need to meet such as units, dollars and or weight, these are shown in **red** if you are below the minimums.

Historical information, such as the last 12 periods of product USAGE can also be displayed so the user will have a better understanding of how this product has been selling.
Proper inventory management is crucial to insuring that you have the correct quantities of products in stock. Running the Set Purchasing Controls in integraERP looks at the products you have selected and updates the following key purchasing components:

- Usage Rate
- Safety Allowance Quantity
- Order Point, Line Point or Minimum and Maximum
- Standard Order Quantity

Running this monthly will keep your re-order controls up-to-date based on sales of the products.

With this Query the following data is also provided:

- Usage for the last 12 months
- Product availability in other warehouses
It is critical to review key areas of your business such as customer aging, vendor aging, low stock items, etc. and there are reports in most systems that provide this information. However, too often the reports are not run on a timely basis. The “Scheduler” function in integraERP enables reports to run automatically as often as you desire with the report being printed or emailed to the person responsible for that area of your business.

In this example, an Aged Analysis is run every weekday at 7:30 in the morning and emailed to bland@softent.com.
This sample pick or delivery ticket provides the following info:

- **Sold To / Ship To**
- **Delivery Instructions**
- **Total Weight**

This is a laser print format. Impact printers with multi-part forms can also be utilized.
This sample invoice provides the following info:

- **Sold To & Ship To Info**
- **Line Item Detail**
- **Invoice Totals with Add-ons**
- **Signature Capture** - this image is stored with the order so it can be viewed or printed again later.

This is a laser print format. Impact printers with multi-part forms can also be utilized.

### Invoice Details

**Sold To:**

LUCK BUILDERS CORPORATION  
P. O. BOX 29682  
12000 WEST PATTERSON AVE  
RICHMOND, VA 23242

**Ship To:**  
LUCK STONE CORPORATION  
FIRST UNION BANK  
2156 WEST RIVER ROAD  
GREENSBORO, NC 27412

**P.O. No.: 2012-553**  
**Phone: (912)555-3214**

**Terms:** NET 30  
**Order No./Rel.: 1392734-000**  
**Customer No.: 5500**  
**SalesRep.: MOTLEY**  
**Ship Via:** TRUCK #140  
**Req. Date:** 02/28/2012  
**Reference:** BANK JOB

<table>
<thead>
<tr>
<th>Product No./Description</th>
<th>Ordered</th>
<th>Shipped</th>
<th>Unit Of Measure</th>
<th>Unit Price</th>
<th>Unit Discount</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>36-09-558</td>
<td>4000</td>
<td>4000 EA</td>
<td></td>
<td>42</td>
<td></td>
<td>1,680.00</td>
</tr>
<tr>
<td>M8 HAMPTON BLEND EML</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STOCK-425 C. 85 S-5.5LB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOL8816</td>
<td>550</td>
<td>550 EA</td>
<td></td>
<td>1.83</td>
<td></td>
<td>1,006.50</td>
</tr>
<tr>
<td>8X8X10 HOLLOW BLOCK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T90 SB/108  32 LB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROAN/S5</td>
<td>40</td>
<td>40 BG</td>
<td></td>
<td>5.85</td>
<td></td>
<td>226.00</td>
</tr>
<tr>
<td>ROANOKE PURE MORTAR &quot;S&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40/PAIL  75 LB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>179</td>
<td>12</td>
<td>12 EA</td>
<td></td>
<td>10.00</td>
<td></td>
<td>120.00</td>
</tr>
<tr>
<td>#179 LOMANCO FOUND VENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/EX ALUMINUM 2.87 LB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sub Total: 3,032.50

**Freight:** 50.00

**NC State Tax:** 151.83

**Total:** $3,234.13
Quotes entered into integraERP can be printed, emailed or faxed to your customer. The quote can also include "additional terms and conditions" that are customized by the user. Multiple formats and/or styles can be setup and when a quote is entered the appropriate "terms and conditions" are selected for this particular quote.

The quote can be automatically turned into a stock order when the customer is ready to order the material. At that point the products are reserved and the normal process of printing a delivery ticket or invoice can begin.

### Sample Forms - Quote example including additional terms & conditions

**MATERIAL QUOTE**

<table>
<thead>
<tr>
<th>Product No/Description</th>
<th>Ordered</th>
<th>Shipped</th>
<th>Unit Of Measure</th>
<th>Unit Price</th>
<th>Unit Discount</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHCOL</td>
<td>6375</td>
<td>6375</td>
<td>EACH</td>
<td>.35</td>
<td>2,295.00</td>
<td></td>
</tr>
<tr>
<td>PH COLONIAL</td>
<td>STANDARD SIZE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROANBIS</td>
<td>35</td>
<td>35</td>
<td>BG</td>
<td>5.65</td>
<td>197.75</td>
<td></td>
</tr>
<tr>
<td>ROANOKE BUFF MORTAR &quot;D&quot;</td>
<td>40/PALL 75 LB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Frederick Block, Brick & Stone**

**Material Quote**

**Terms and Conditions of Sale:**
1. Purchaser assumes SOLE RESPONSIBILITY for quantities on material ordered.
2. All orders subject to ABC Brick & Block Return Policy.
3. All special orders for non-account customers are required to be paid in full prior to product(s) being produced or inventoried. Once production begins the order cannot be cancelled.
4. Materials that have been quoted at the net price - any discount applicable will be reflected on the monthly statement.
5. Materials ordered will be billed within 14 days of receipt at ABC Brick & Block.

**Additional terms and Conditions:**

**General:**
- All complaints with regard to color, size, texture and breakage must be addressed before using in a wall or application. USE WILL CONSTITUTE ACCEPTANCE.
- ABC Brick & Block will not be liable for any claim for damage to materials resulting from improper cleaning, storage, handling or installation. Do not use Muriatic Acid for cleaning.
- All materials not picked up after 60 days becomes property of ABC Brick & Block.
- Additional freight may be charged for anything less than full truckload quantities.

**Delivery:**
- ABC Brick & Block will not be responsible for damage to in ground personal property or utilities not seen by the driver unless indicated in advance on the delivery form by the customer.
- ABC Brick & Block is not responsible for mud, dirt or debris left after delivery or pulled onto roads from the job site.
- Fuel surcharges may apply.

**Brick:**
- Brick is made of naturally occurring minerals, clay and shale. As such, they are subject to shade variation. The mason should choose, or blend, material from different pallets when placing material in the wall. ABC Brick & Block will not be responsible for replacing material or labor costs associated with rejected material for normal shade, color or texture variations that are within industry accepted ranges.

**Block:**
- For split face block orders less than 2,000 units (or 2,000 soft for split rock) a flat $500.00 manufacturing set-up fee will apply per size, color and texture.
- The wooden pallets that block are delivered on may be partially refundable with a copy of the receipt.

**Precast:**
- After an order is placed for Precast, a drawing is produced by the manufacturer/ABC Brick & Block for review and signature by the customer. Production will be scheduled and begin after the signed drawing(s) have been received.
- ABC Brick & Block will not be responsible for color variations, shading, texture or chipping once installed.

**Stone:**
- Stone is a product of nature and characteristics such as color and texture cannot be controlled. Samples are only provided as a general representation of the product to be shipped.