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.
Stock# 36-09-558 is selected and a quantity of 4000 is entered. Pricing for this product is shown along with an extension of the amount - $1,480.00.

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.

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.
Quantity Configurator—with the simple click on an icon, the above “Quantity Configurator” box appears. It is used as follows:

Selling a quantity that is even cubes and/or straps—For brick, the configurator computes the number of cubes, straps and eachs required to complete the quantity requested by the customer. It then suggests a "new" quantity with an even number of cubes and/or straps. In the above example, the customer is asking for 4000 brick. The configurator then suggests a quantity of 4250 (10 cubes) or 4080 (9 cubes and 3 straps) which is often the way you want to sell the product.

The configurator can also be used to compute the number of bricks or pavers required to cover an area or square feet. If a customer wants enough pavers to cover 2500 SQFT, then by entering 2500 in the "Alt Sell" field, the configurator will compute the quantity of pavers required.
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.
In addition to totaling the order with sales tax if applicable, there are a number of other items that integraERP checks:

**FREIGHT** - there are multiple options regarding freight charges including flat rates per zone, variable rates based on the products being shipped and minimum freight charges. If an item on an order would normally have freight or a delivery charge and none is computed or entered a warning message will display.

**PALLET** - if an item is on an order that normally would include the use or sale of a Pallet, a warning can also appear.

**TICKETS** - from this screen a delivery ticket, quote, invoice or an acknowledgement can be printed, emailed or faxed.
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.

FINAL LOAD - often there is a need to deliver a final or “finish up” load which may not be subject to a delivery charge. If the “Final Load” box is checked the minimum freight will not be calculated.

SIGNATURE CAPTURE - utilizing a signature pad attached to the PC, the persons 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.
Many times there are multiple lines on an order (like the top screen above) and the customer only wants a few items shipped to start the job. Quick Ship allows the dispatcher or operator to quickly select the line items for this delivery by selecting them on this screen. The remaining items will be backordered and ready for the next delivery. For this initial delivery, only the Block, Mortar and Sand are selected as shown on the bottom screen.
Often a request is made from the contractor or mason asking what has been delivered to a job. For these situations a Product Movement by Job or Brick Count inquiry was designed. The system will summarize shipments by product by customer and job. Above you see that (4) products were ordered for the Wells Fargo Bank Job. Of these, no brick has been delivered, all block has been delivered and a partial delivery of mortar had been made. The quantities ordered, shipped and remaining are clearly listed on the screen.

If more details are needed, the operator can drill down to see the Order#, Date and details of that delivery. For additional detail, a drill down is available by selecting the Order# and a complete view of the entire order is presented on the screen. This functionality answers many questions and saves an enormous amount of time over the traditional method of manually reviewing delivery tickets for a job or running a report.
Run# tracking can be selected by individual product or stock item. If you choose to track Run#, they are normally assigned when a purchase order is received. The above PO was issued for 8500 of product# PHCOL - when received the Run# of “091211T” was assigned to this receipt and integraERP will track the available quantity and to what customer and Job the Run#s were delivered.

When using Run#, the product inquiry screen will display all Run#s available for that product. For this product PHCOL, there are 3 Run#s in stock each with different quantities available.
When orders are entered for Run# products, the Run# can be assigned at entry time, which directs the yard to pull or load a particular Run# or the Run# can be added once the yard indicates which Run# was loaded for this delivery. In order entry, the Run#s can be displayed so the dispatcher or operator can select or verify the Run# for this delivery. That information is stored with the order so when more PHCOL is needed for this Job, a quick inquiry will show what Run was utilized.
Getting paid promptly is imperative for proper cash flow in today’s environment. A traditional step to help in this area is offering prompt pay cash discounts such as 2% 10 Net 30. The difficulty with this approach is the fact that you are offering the same 2% on all products which have a wide range in gross margin. Standard software allows a prompt pay discount but it applies that same discount to all items on an invoice. integraERP allows 6 different methods of prompt pay discounts:

- Customer & Job by Product
- Customer & Job by Product Category
- Customer by Product
- Customer by Product Category
- Customer Type by Product Category
- Customer Type with Quantity Breaks

By utilizing this feature in integraERP, the discount can vary by customer and product which allows you to tailor the discount as needed. In the example below Luck Builders gets 2% on Brick, 10% on Mortar and 12% on Block.

With this feature, integraERP will calculate different prompt pay discounts for each category and summarize them on the invoice. You could also setup a scenario where a customer normally receives a discount, but due to pricing on a particular job, you are not offering a discount. This can be accomplished in integraERP as well.
It is difficult to manage inventory availability when there are a number of orders for a product with varying delivery dates. If you were to perform an inventory inquiry on the above product PH/MODULAR it would display the following:

- **On-Hand**: 65000 (physical count on the yard)
- **Reserved**: 89900 (orders in the system to be delivered)
- **On Order**: 18700 (purchase orders in the system that have not been received)
- **Selling Net Available**: 24900-

This information is important but it does not provide the data you need to make decisions about upcoming deliveries and promises you may have made regarding delivery dates. The Product Allocation Forecasting screen above presents a detailed analysis for a particular product with a “Running Available” column. It sorts all sales orders and purchase orders for this product by date providing a running or available product quantity as deliveries are made and purchase orders are received. In this example you will see that the delivery for ABC Masonry on 10/27/11 cannot be accomplished since your On-Hand inventory will go negative after the previous delivery. That delivery cannot be made until at least 11/01/11 when PO# 91 for 18,700 arrives. As a result of reviewing this information the salesperson or dispatcher can react and contact ABC Masonry and re-schedule a delivery, call Pine Hall and speed up the PO delivery or reduce the quantity for Luck Builders (the delivery before ABC) to cover what is needed.