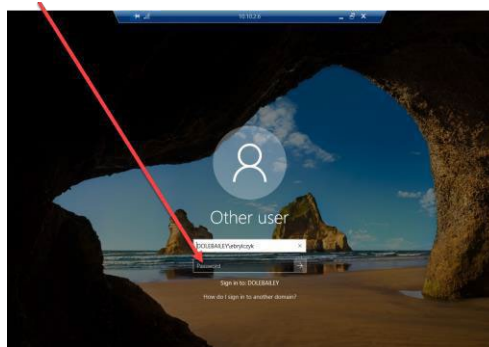## Standard Operating Procedure
# Provisions – Sales Order Entry Manual

Signing In:

Once in your PC click the Dole & Bailey Icon and signin with Password D0le2022! (the O in Dole is a zero)


You will then SIGN IN with your Unique User ID and Password. Should you ever forget and have an issue speak with D&B IT and they can reset prompting a new signin and password creation. Reminder that after entering your PASSWORD it requires a double tap on ENTER.


Now that you are in you are immediately brought to the MAIN MENU. Once in LIVE you can begin to establish your unique favorites in the center of the screen. Until then focus needs to be on the selection SALES as circled. Click on this to be brought to the Sales Menu.
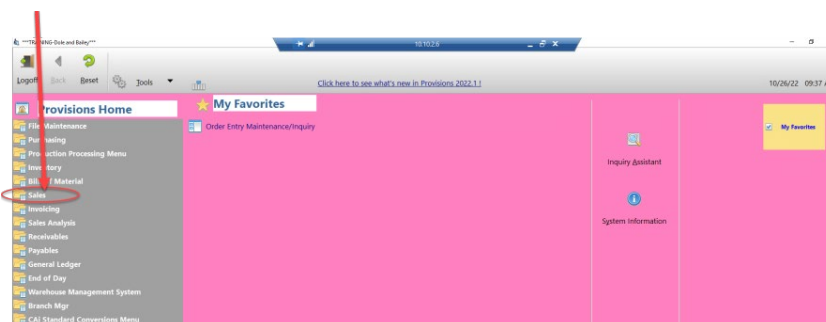
Once in Sales Menu double click on **Order Entry Mainenance/Inquiry**
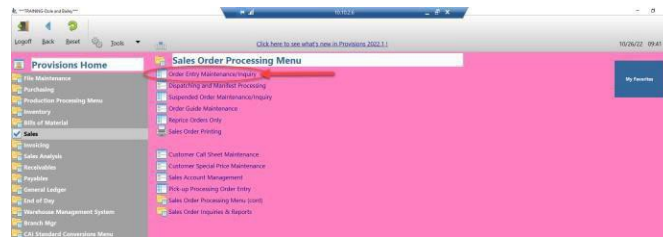
This will bring up the Order Entry System that will be completely blank and it is important to notice that on Order Entry there are FIVE screens that you can toggle back and forth through at will.
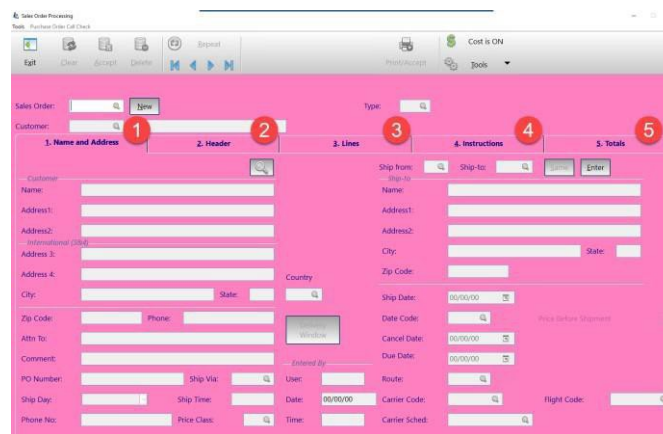
First step "1" is to either Lookup and existing order if you are EDITING or ADDING to existing order, if starting NEW, then click the NEW button and it will take you to next CELL "2" to search for the customer.
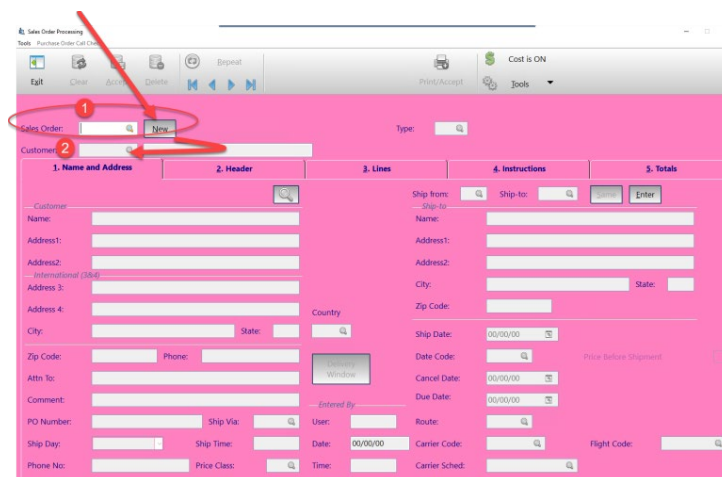
There are two methods for looking up a customer. First version is to begin typing the name of the account into the CUSTOMER cell and when ready hit F2 and it will bring up menu to select.
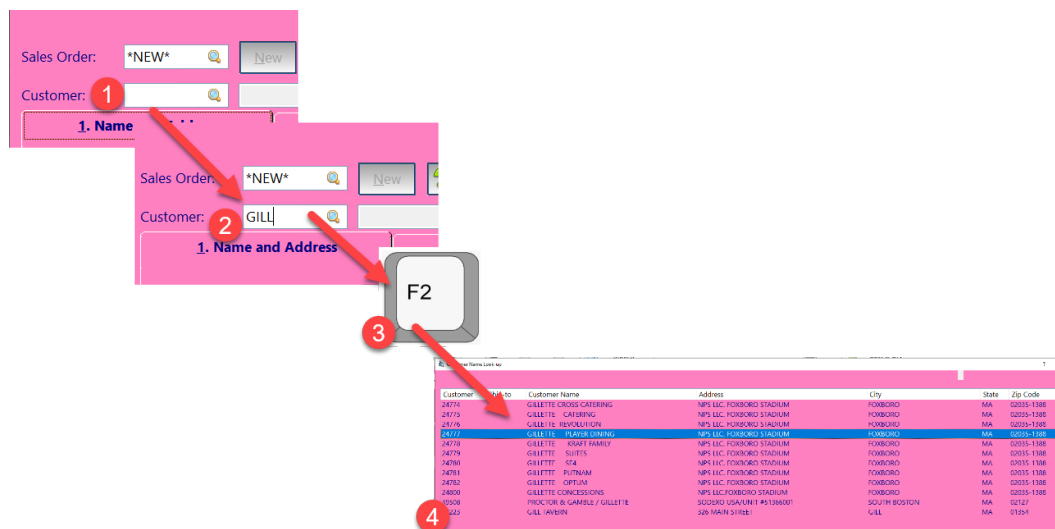
Once you DOUBLE CLICK on a customer it will bring that up for ORDER ENTRY. First Screen that pops up is the Customer Info Screen. If any detail info needs updating go ahead and populate. Once all updates are complete hit the OKAY button to move to next screen.

Once you hit OKAY Provisions will take you to the NAME AND ADDRESS screen. Ship Date will auto populate for next scheduled delivery day for the Route that customer is assigned to. Here are the critical fields on this page you must input info into.

1. Attn To: This must be the name of individual placing the order.
2. Comment: Shipping Day for cross check
3. PO Number: This should be used for actual PO# if provided by customer

Once you enter through all cells it will take you to LINES page or you can simply click on the LINES tab at top middle of the page.

ACTUAL ORDER ENTRY

After entering all NAME AND ADDRESS info you will be taken to the LINES tab where you begin to build your order. Here are the key areas of attention on the LINES page.

You will find that majority of order will be entered using the Order Guide if document is well managed. Click on GUIDE and this page appears.

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Pricing by MARGIN can be done using the F3 Key anywhere in the system, or you can manually type your preferred price.

Sort your Columns – I sorted this order guide by most recent purchase date, which is what I feel will be the most frequently used tool in the Order Guide.

As you populate your Order Guide with purchased items you can see they change to PURPLE indicating an Ordered Item. This will be more prominent once we go LIVE and change to White Background.

When you leave the Order Guide and go back to main order entry screen. You will be able to review each item and the Margin you sold at, as well as the Order Totals currently attained.

To manually add an item that is not on the Order Guide you simple start typing in ITEM NUMBER field.   Use same disciplines applied in UBS as far as two to four letters of each word, and use D&B Glossary of abbreviations. You can use as many words as you would like**.   Then Hit "F2"**

The items that match your request will appear in list form with all information about that products stock status at your disposal.

To add instructions to an item or our old "z line" click on the item you want to add an instruction for, and hit REM for remark.

You then have the option to type remark notes, specs, date information, etc. If you would like this remark to remain permanent for this item for this customer, you can click the file folder with the check mark. When done, click ok.

The R with a star indicates that the item has a remark on the order.

Line	Item Number	Description			Quantity	U/M	Price/Cost	Extension	G/P%
001.00	965800	CHEESE GREAT HILL BLUE	6#		5.00	EA	12.05 LB	391.63	
		USA MA C GREAT HILL	*R		@ 6.50	LB			

On the Totals tab you can add delivery fees by choosing Misc Charges, click the magnifying glass and then choose your fee type and amount.

On the Instructions Tab of the order, lines one and 2 will print on the invoice, lines 3 and 4 will print on the driver manifest.

To send an order confirmation to your screen hit Print and Accept, to send the order through to the warehouse, hit Accept.

Sales Order Processing - Document # 100103

Tools   Purchase Order Call Check

| Exit | Clear | Accept | Delete | | | | | | Print/Accept | Tools |

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10160   1928 BEACON HILL   BOSTON

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