



Power in your Palm

Create sales orders easily... any time, anywhere

WorkEzy™ Sales Order enables your salesforce to spend more time on sales rather than on sales administration. This easy-to-use add-on application to WorkEzy™ Customer Manager allows you to create new sales orders, issue credit notes, manage goods exchange and cash collections on the Palm OS® handheld device while on the move... any time, anywhere. All sales documents created are seamlessly transferred back to ACCPAC® for Windows Order Entry and Inventory Control modules. There is no re-keying in of order information into ACCPAC®. Enjoy the convenience, accuracy and speed of sales.

◆ Create sales orders in 5 easy steps

Step 1: Select type of transaction

The screenshot shows the 'Order Manager' screen with a dropdown menu open. The menu options are: All, Credit Note, Exchange, and Invoice. The background shows a list of sales documents with columns for SO No, Cust, and Date.

Annotations:

- create a new sales order, issue a credit note, or even create a goods exchange document (points to the dropdown menu)
- view all sales documents created (points to the list of documents)

Step 2: Specify cash or credit sales, and select customer

The first screenshot shows the 'Order Manager' screen with the following details: Invoice IN000005, Active, Date: 7/31/01, Payment: Cash, Customer: Mr. Ronald Black. The bottom shows Sub Total: 0.00, 10.00% Tax: 0, and Net Total: USD 0.00. Buttons for Done, Detail, Confirm, and Note are visible.

The second screenshot shows the 'Customer List' screen with a list of customers. The customer '1200/Mr. Ronald Black' is highlighted. A magnifying glass icon is used to search for a customer.

Annotations:

- select customer from list by clicking on finder (points to the magnifying glass icon)
- determine whether customer has exceeded credit limit (>) or is placed on hold (*) (points to the asterisk symbol next to the selected customer name)

Step 3: Add items to the new sales order

Order Manager Invoice
Order No : IN000005
Mr. Ronald Black

Product	Qty	UOM	Amt
A11050	3	Ea.	10.00
S1300W	1	Ea.	244.95
A1750G	20	Ea.	799.60
A1778G	100	Ea.	2098.00
F1470T	2	Ea.	1190.00
C1220B	1	Ea.	514.95

click add button to add items

Order Manager Invoice
Order No : IN000005

Product Detail

Item : A14000
Desk Note Book

Unit Price : 24.95
Quantity : Ea. 10+
Amount : CAD 249.500

use finder to select products and unit price

Step 4: Confirm the sales order

Order Manager Invoice
IN000005 Active

Date: 7/31/01
Payment: Credit
Customer: 1200
Mr. Ronald Black

Sub Total: 7115.50
10.00% Tax: 711.55
Net Total: USD 7827.05

click Confirm button to update order and record amount collected from customer, if any

Order Manager Invoice

Confirmation

Confirmed
Shipped Date: 8/1/01

Total CAD 6237.500
Collected CAD 0.00
Ref No
Balance CAD 6237.500

Void

key in amount collected and balance will be shown

Step 5: Proceed to next order or download to ACCPAC®

Print the confirmed order and/or continue with the next sales order. Once done with the orders, download them to ACCPAC® directly via hot-sync. Data can be downloaded to ACCPAC® via the handheld device cradle, modem or other wireless communication devices that support data transfer technology.

◆ Global settings for tax rates and ACCPAC® integration

Order Manager Invoice

SO No Cust Name Date

Accpac Logon

User ID: SAMLTD
Password: *****
Company: Sample Company

ACC PAC® logon information for direct integration to ACC PAC®

Order Manager Invoice

SO No Cust Name Date

Enter Tax Rate

Tax Rate: 10.00 %
Tax Ref: VAT

specify the tax rate, if any

REQUIREMENTS
WorkEzy™ Customer Manager

COMPATIBILITY
Compatible with Palm OS® Ver. 4 & above*
ACCPAC® for Windows Order Entry 4.x & above*

ACCPAC® for Windows Inventory Control 4.x & above*
ACCPAC® for Windows Accounts Receivable 4.x & above*

* Please consult our sales representatives for more details on compatibility and technical requirements.



Stone Forest IT Pte Ltd

Member Horwath International

18 Cross Street, #08-01, Marsh & McLennan Centre, Singapore 048423
Main (65) 6533 7600 | Fax (65) 6531 1888
Email info@stoneforest.com.sg | www.StoneForestIT.com.sg

IT Advisors to Growing Businesses

www.workezy.com

Copyright © 2001-2003. Stone Forest IT Pte Ltd. All rights reserved.
Palm OS® is a registered trademark, and Palm is a registered trademark of Palm Inc. Third-party product and brand names may be trademarks or registered trademarks of their respective owners.