STONE EDGE

The Stone Edge Order Manager

User's Guide

VERSION 7.0

Revision 1 Modification 3

6/3/15

Message from the Editor:

This document pertains to Version 7.0* of the The Stone Edge Order Manager order management software application. More reference material is available in the online Knowledge Base.

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For technical support:

Phone: 484-927-4804, option 2

Email: support@stoneedge.com

* * *

Stone Edge Technologies, Inc.

Summary of Changes

Revision 1 Modification 2 6/3/15

- Updated URL to Knowledge Base links.
- Removed System Parameters text from this guide and added link to Knowledge Base topics instead.

Revision 1 Modification 0 8/15/2013

- All user interfaces have been completely overhauled and reorganized to enhance the usability of the program.
- A new Setup Guide helps you establish the most basic settings when a new store data file is created. The Store Setup Wizard is still accessible to adjust more advanced settings.
- Other “Wizards” have been added to lead new users through certain functions of the program, such as for the purpose of importing data into the store data file. Otherwise, the basic functionality of the program has not changed from the Version 5.9 series.
- The External Stack is no longer supported.
- To print FedEx shipping labels directly through Stone Edge, you must use zFirm’s ShipRush for FedEx software. Stone Edge Technologies provides a free license for ShipRush to those customers with a current support contract. Contact the Sales department to obtain the license code.

Table of Contents

1 Getting Started

This chapter includes the sections listed below, which briefly describe The Stone Edge Order Manager's capabilities, requirements, and how to get started:

Overview: The Stone Edge Order Manager 7.0

System Requirements

Installation – Quick Start Guide

Overview — The Stone Edge Order Manager Version 7.0

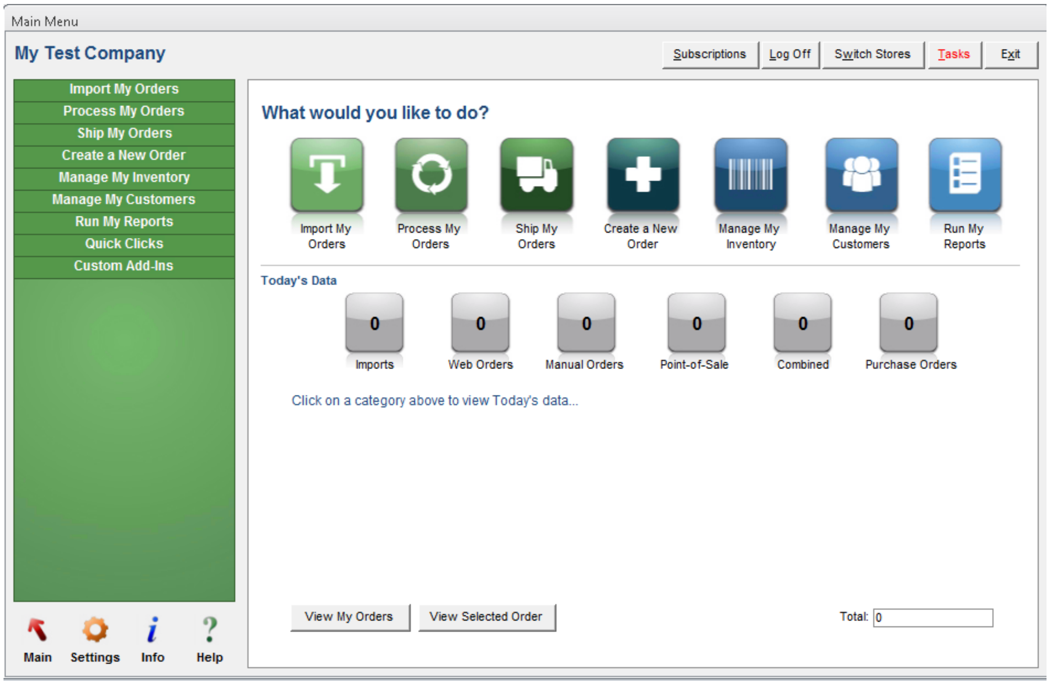
What is The Stone Edge Order Manager?

The Stone Edge Order Manager is a complete back-office system for single or multi-channel merchants. Orders from Web stores, retail locations (Point-of-Sale), and traditional Mail Order businesses are managed in this single application which provides practical customer, inventory, and order management tools. You can process orders and manage inventory from multiple Web stores in the same system *and* retain the unique branding of each individual store. The Stone Edge Order Manager is compatible with many shopping cart systems and Marketplaces, including the following:

The Main Menu

The Main Menu has been re-designed to improve your experience. Many of the basic program functions are now broken down into wizard-like processes. Manual Orders (**Create a New Order > For a New Customer**) and importing data from an external source (**Manage My Inventory > Import My Inventory -File**) are two examples of this change.

The Accordion menu on the left is used to navigate to various functional areas of the program. **What would you like to do?** short-cut buttons help you get to the most commonly used screens quickly. These buttons can be configured differently for each workstation through the Settings menu.



In addition to configuring personal preferences, the Settings menu is also the new location of most of the functions formerly found in the Maintenance Menu.

Some activities formerly housed in the Maintenance Menu have also been moved to the Accordion menu of the appropriate function screen. For example, the **Revise Line Item** button is now a link on the **Items** tab of the *Process Orders* Accordion Menu. **Main Menu > Process My Orders > View and Process My Orders > Items > Revise Line Item**.

To return to the Main Menu from any location, click **Main**.

Note: *The exact appearance of the Main Menu depends on parameter settings.*

Subscriptions

Subscriptions opens Stone Edge's companion product, Subscription Manager, for recurring orders. This button is only visible if a license has been purchased and the product is installed. Refer to the Subscription Manager Knowledge Base topics for more information about using the product.

Log Off

Log Off allows another user to log into Stone Edge on a given workstation without exiting the application. This button is only visible if the Security system is enabled. Refer to Logging in to The Stone Edge Order Manager, in Chapter 2, for more information.

Switch Stores

Switch Stores provides a list of previously opened store data files or their ODBC connections. Select a store from the list and click **Open,** or select the Folder icon to navigate to the location of a different store file or backup file. Some merchants may have multiple, unrelated Stone Edge Order Manager stores for business that do not share the same inventory. See ***Switching Stores***, in Chapter 2, for more information.

Tasks

opens the *View Notes & Tasks* screen. The label text is red if a task is assigned to the current user. Tasks can only be assigned when the Security system is enabled, but Notes are always available. Notes can be added to customer, supplier, and order records. Refer to ***Checking Notes and Tasks***, in Chapter 2, for more information.

Exit

Closes the application.

Main

Return to the Main Menu after viewing other screens.

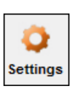
What would you like to do?

This section of the Main Menu contains programmable buttons which provide quick access to the commonly used areas of the program. Go to the **Settings** menu to make your selections.

Today's Data

This section of the Main Menu shows the individual running total of orders from various sources as well as the Combined total from all sources. Click on one of the categories to see more detailed information. Use **View My Orders** or **View Selected Order** to open the Process Orders screen. The Total field shows the sum amount from all orders received in the current day.

Settings



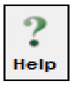
Select **u**ser preferences for Quick Clicks and short-cut buttons or make a selection from the accordion.

Info

Select **Info** to view Company & Connections information, such as the current program version, the location of the store data file and the shopping cart systems which are configured, etc.

To return to the Main Menu, click **Main**.

Help



Select **Help** to submit a support ticket, visit the Knowledge Base, view Training Videos, review Release Notes and Support Policies, etc.

To return to the Main Menu, click **Main**.

Import My Orders

The section of the Main Menu is where activities related to importing orders from a Web store are accessed:

Import My New Orders

Import My Old Orders

View My Shopping Carts

View My Import Template(s)

View My Batch Report List

Refer to ***Importing Orders***, in Chapter 7, for more information

Process My Orders (Process Orders)

This section of the Main Menu is where orders from any source (Manual orders, Web orders, and POS) are viewed. Orders can be manually approved or cancelled, payments, returns or exchanges can be managed, shipping labels can be printed, and tracking information can be entered manually through View and Process My Orders. To approve, cancel or collect payment for a batch of orders, use the Multi-Order Processor. You can also enter criteria to search for a particular order by selecting Find an Order.

View and Process My Orders

Find an Order

Multi-Order Processor

Refer to ***Viewing Orders***, in Chapter 7, for more information.

Ship My Orders

This section of the Main Menu is where you can prepare your orders for shipment. Businesses that are large enough to have dedicated packing or shipping workstations normally use these screens rather than the Process Orders screen (View and Process My Orders) to print shipping labels. Choose the Pack & Ship screen to confirm items as they are packed and print a shipping label through one of our integrated solutions, or use the QuickShip screen to simply print the shipping label through one of our integrated shipping solutions.

Pack My Orders

Ship My Orders

Refer to Chapter 8, ***Packing Orders***, for more information..

Create a New Order

This section of the Main Menu is where you create a manual order or open the Point- of-Sale system. For a New Customer and For an Existing Customer are both for placing phone, fax or mail orders. The latter selection gives you the ability to search for an existing customer record rather than manually entering the customer data. The Point-of-Sale system is a virtual cash register used for brick and mortar store orders.

For a New Customer

For an Existing Customer

Point-of-Sale

Refer to ***Entering Orders Manually***, in Chapter 7, for more information.

Manage My Inventory

This section of the Main Menu is where your product, supplier and purchase order information added, viewed, changed, imported or exported:

View and Manage My Inventory

Import My Inventory - File

Import My Inventory - File

Import Cost, Price & Weight

Export My Inventory

Manage My Suppliers

Import My Suppliers

Manage My Purchase Orders

Refer to the section entitled ***Importing Existing Databases***, found later in this chapter, as well as Chapter 3, ***Managing Inventory***.

See Chapter 4, ***Managing Suppliers and Purchase Orders.***.

Manage My Customers

This section of the Main Menu is where information about your customers is added, viewed, changed, imported or exported:

View and Manage My Customer

Import My Customers - File

Import My Customers - File

Export/Email My Customers

Refer to Chapter 5, ***Viewing Customers***, for more information.

Refer to the section entitled ***Importing Existing Databases***, found later in this chapter, as well.

Run My Reports

This section of the Main Menu is where information you can run Stone Edge or Communiqué reports, view the batch print queue or dashboard statistics:

Run My Management Reports

View My Batch Report List

Open My Dashboard

Open Communiqué

Refer to Chapters 2 and 10 for more information.

Communiqué

Altaireon's Communiqué is a feature-rich desktop based professional grade reporting tool that allows you to extract detailed information from The Stone Edge Order Manager regarding their online businesses. Communiqué offers a Dashboard feature to help merchants keep pace with changing trends and make educated business decisions in a timely fashion.

The Stone Edge Order Manager contains an integrated "lite" version of Communiqué that can be accessed from the link in the Reports section of the Main Menu. The lite version contains the fully functional Dashboard feature and twenty-five free reports with no limitations. The remaining standard reports are limited to a single page and will contain a watermark. If you decide to purchase an upgrade to the full version of Communiqué, the remaining standard reports are unlocked and you are sent a link where they can download the latest setup file to install the full version of the product. When launched, The Stone Edge Order Manager checks the expected location to see if the full version is installed, and if it does not find it, the program uses the lite version instead. For more information, visit Altaireon's website.

Quick Clicks

Quick Clicks are links which take you to a commonly accessed areas of the program. The links which appear in the Quick Clicks tab are user definable. Use the Settings menu to set your preferences by workstation. You can see the list of possibilities on the Stone Edge Settings page. The default settings of the Quick Clicks are:

System Parameters

Configure the appearance or behavior of The Stone Edge Order Manager.

Store Setup Wizard

Another interface where you configure many of the The Stone Edge Order Manager settings. It is also accessible through the Advanced Settings tab of the Setup Guide which is launched when a new store file is created. You can return to the Store Setup Wizard to alter settings at any time.

Inventory

Add, view or alter product records.

Suppliers

Add, view or alter supplier records.

Purchase Orders

Add, view or alter supplier records.

Custom Report Maintenance

Import, export and manage the non-standard reports which appear on the Report Menu. Refer to ***Custom Report Maintenance***, in Chapter 2, for more information.

Shopping Carts

Define your web stores in The Stone Edge Order Manager and import orders.

Compact Data File

Recover unused disk space left over from deleted information and rebuilds all the indexes in the Microsoft Access store database and the OMTemp database. Compact an Access store data file at least once a week. Backup the data file prior to compacting it. Refer to ***Managing the Database*** in Chapter 2, for more information.

SQL databases are not affected by this and must be maintained through SQL database management tools, such SQL Server Management Studio.

Backup Data File

Copies the current store's data file to the archive directory with a different name. Refer to ***Managing the Database***, in Chapter 2, for more information. Back up your data file at the end of each business day. Backup copies can also be manually created via Windows Explorer or My Computer using the Copy and Paste functions. It is strongly recommended that any backup copies are included in your off-site backup procedures.

The information contained in your data file(s) is unique to your store(s). It contains all of your customer, order, and supplier records in addition to all of the system settings you entered in System Parameters. If the production store data file is lost or becomes corrupted, your most recent backup can be restored. Data entered since the last backup file was created must be re-entered.

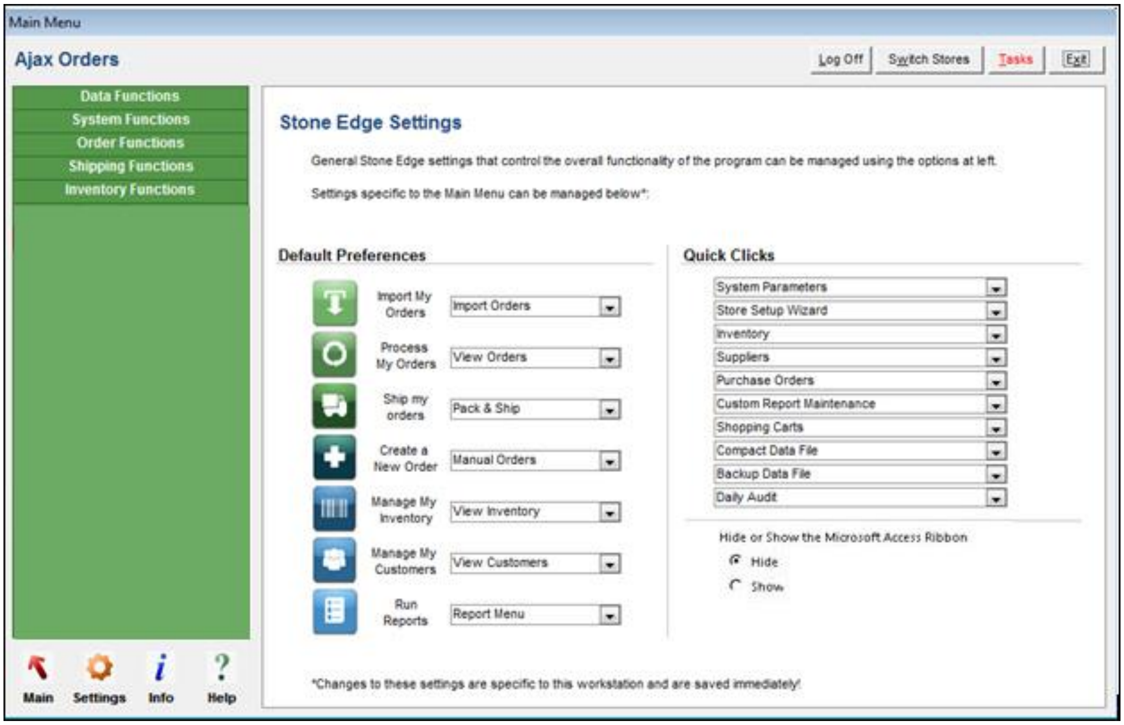
SQL databases are not affected by this and must be maintained through SQL database management tools, such SQL Server Management Studio

Daily Audit

Resolve your income within the system and reconcile the funds in your cash register(s) at the end of each day. The Daily Audit can be configured to include all order information entered into the Point of Sale (POS) screen and the Web, or just the order information entered into the POS. Refer to ***Auditing Shifts***, in Chapter 6, for more information.

Settings Menu

Settings contains many functions previously found in the Maintenance menu. It is also where user preferences for **Quick Clicks** and **What would you like to do?** short-cut buttons are configured.



Stone Edge Settings

Default Preferences

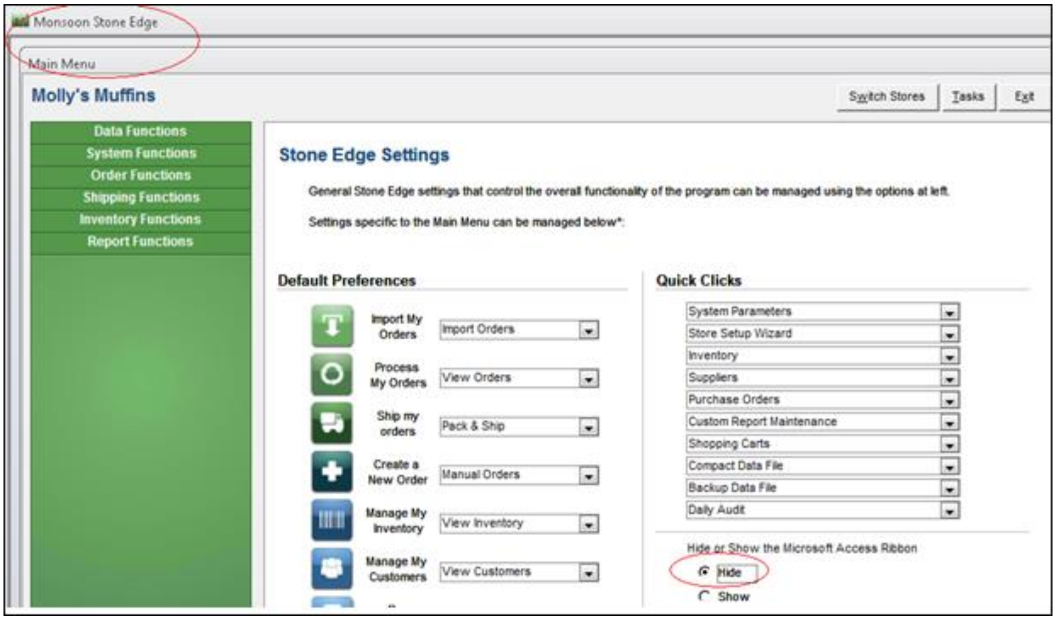
Choose the screen you want each short-cut button to open from its drop-down list.

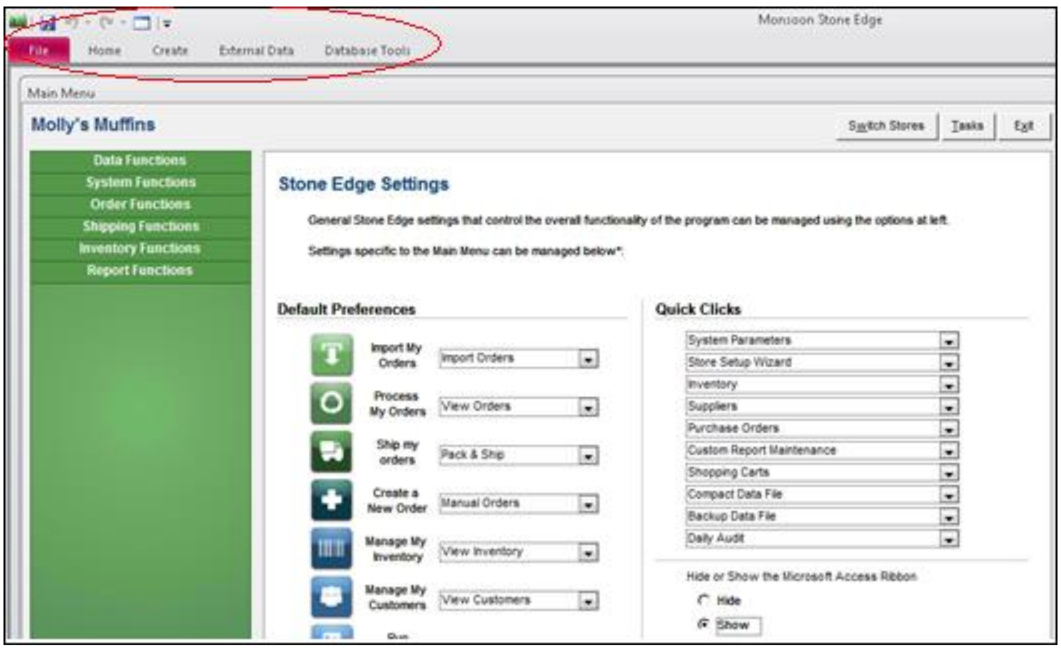
Quick Clicks

Choose program locations to appear in the Quick Clicks tab by selecting them, in sequence, from the drop-down lists.

Hide or Show Microsoft Access Ribbon

Select the appropriate radio button to hide or show the ribbon.





Settings Accordion

The Settings accordion is comprised of the following sub-sections: Data Functions , System Functions , Order Functions, Shipping Functions , Inventory Functions, and Report Functions. Select a tab in the Accordion to see the list of activities available in each section.

Click **Main** to return to the Main Menu.

Data Functions

This section contains the following activities:

Accounting Export Setup

Archive Old Data

Assign Carts to Orders

Backup Data File

Bronto Contact Export

Clear Transaction Flag

Compact Data File

Convert to SQL Server

Export Accounting Data

List Maintenance

Payment Methods

Re-Import Archived Orders

Road Trips

Setup Custom Fields

To return to the Main Menu, click **Main**.

System Functions

This section contains the following activities:

Create New Store

Point-of-Sale Setup

Security Options

Set System Parameters

Shopping Carts

Status Events

Store Setup Wizard

Update License File

Order Functions

This section contains the following activities:

Approval Rules

Coupons

Daily Audit

Discounts

Order State Rules

Point-of-Sale Setup

Sales Tax Rates

To return to the Main Menu, click **Main**.

Shipping Functions

This section contains the following activities:

Batch Drop-Ship

Copy Shipping Queries

Fulfillment

Import .csv Tracking Numbers

Import PPP Tracking Numbers

Process DAZzle Batch

Process Tracking Numbers

Shipping Export Templates

Shipping Setup

ShipWire: Import Tracking Numbers

ShipWire: Synchronize QOH

UPS WorldShip Setups

View or Void FedEx Shipments

View or Void UPS Shipments

To return to the Main Menu, click **Main**.

Inventory Functions

This section contains the following activities:

Assemblies

Build Sub-SKUs

Change SKUs

Change Suppliers

Enter Barcodes

Fill Backorders

Global Editor

Initialize FIFO Data

Kits

Levels

Multi-Record & Price Editor

Scan Non-PO Items

Standard Messages

Transfer Inventory

To return to the Main Menu, click **Main**.

Report Functions

This section contains the following activities:

Custom Report Maintenance

Email Template Editor

Print Recovery

Set Report Options

To return to the Main Menu, click **Main**.

System Software Requirements

Refer to the Knowledge Base topic for the most current information about system requirements.

Installation – Quick Start Guide

The Stone Edge Order Manager can be used on a single workstation or across a local area network (LAN). The program was not designed to be used across the Internet with Terminal Services, however some of our customers use the program in that manner. Stone Edge Technologies, Inc. does not recommend this and it is not covered by your support contract.

The default location of The Stone Edge Order Manager's application files is in the c:\StoneEdge directory**. It is highly recommended that you do not change this,** but if absolutely necessary, a different location **on the c:\ drive** may be specified. Doing so may cause problems with other third-party add-ons, such as Endicia DAZzle, ***if the target PC does not include a hard drive with the letter assignment of "c:\".***

For step by step instructions to install the program and perform minimal configuration, see the **Quick Start Guide for Stone Edge 2012**, which is available at the **Knowledge Base > Additional Resources**, the download gateway, and also in the program installation folder.**.**

2 Configuration and Maintenance

This chapter provides additional information about The Stone Edge Order Manager's many parameters, lists and options. Many of them can be set via the Setup Guide or Store Setup Wizard, while others can only be set via the system parameters. Routine maintenance procedures are also discussed in this chapter. Please review them carefully and become familiar with the processes before a business disaster occurs.

The sections of this chapter are:

Import Inventory

From an external file

The Stone Edge Order Manager makes it easy to import product information from a Microsoft Access (.mdb) file or a comma- (.csv) or tab-delimited text (.txt) file.

1. Go to **Main Menu > Manage My Inventory > Import My Inventory - File**.
2. Type in the path to the text file or database that contains the data to be imported, or click the **Folder** to navigate to the location of the file. If a database is used, the table containing the data must also be selected.
3. The program displays the records from the input file at the bottom of the screen. If the input file contains headers, the program attempts to map them to the appropriate Stone Edge fields automatically. Manually map any fields the program is not able to distinguish later in this process.
4. Click **Next** to proceed to the **Import Options** tab.
5. Change the default settings of the **Field Delimiter** field and **First Row Contains Field Names** check box as needed to match your input file.
6. Choose the mode the import process should follow by selecting or clearing the **Start by Deleting All Existing Products**, **Create New Products**, or **Modify Existing Products**, check boxes.
7. Optional: To add a supplier record at this time, click **Add New** and enter basic information about the new supplier. Once added, the new supplier is listed in the **Default Supplier** drop-down list.
8. Determine how the program handles Quantity on Hand information during the import. Select **Replace** to substitute the value in the input file for the value in the existing product record, or select **Add to** and change the QOH in the product record to the sum of the existing value plus the QOH value in the input file.
9. Click **Next** to proceed to the first page of the **Inventory Fields** tab and map those fields, as needed.
10. Click **Next** to proceed to the second page of the **Inventory Fields** tab and map those fields as needed.
11. If custom inventory fields are defined, click **Next** to proceed to the first page of the **Custom Fields** tab which contains custom Text and Integer inventory fields. Map those fields to fields in the input file, as needed.
12. Click **Next** to proceed to the second page of the **Custom Fields** tab, which contains custom Currency and Date inventory fields.
13. Click **Next** to proceed to the **Web Fields** tab and map those fields as needed. Most of these fields are shopping cart specific and may not apply to your shopping cart system.
14. Click **Next** to proceed to the **Pricing Fields** tab, which relates to the multi-level pricing feature of the program. Price Level 1 is not listed here because it is covered by the **Regular Price**, **On Sale** and **Sale Price** fields on the first page of the **Inventory Fields** tab.
15. Click **Next** to proceed to the **Finish and Import** tab.
16. Select the **Backup Before Importing** check box to make a backup copy of the program tables affected by this process. Click **Restore from Backup** on the **Select File to Import** tab if it is necessary to roll-back the changes. For example, if you discover that a field was mapped incorrectly, restore the backup, correct the field mappings and repeat the import process.
17. Optional: Click **Test Data** and the program checks for limited data errors.
18. Select **Begin Import** to start the process.
19. If a backup copy was requested, respond **OK** to the confirmation message.
20. The program provides a summary of the outcome of the import process that includes a count of any new records added and existing records edited.
21. Click **OK**.

From a shopping cart

The Stone Edge Order Manager is also able to import product data directly from some shopping cart systems via the *Shopping Cart* functions screen. See the **Additional Functions** section of the specific shopping cart's Knowledge Base topic for details.

Import Cost, Price & Weight

The Stone Edge Order Manager makes it easy to import product information from a Microsoft Access (.mdb) file or a comma- (.csv) or tab-delimited text (.txt) file.

1. Go to **Main Menu > Manage My Inventory > Import Cost, Price & Weight**.
2. Type in the path to the text file or database that contains the data to be imported, or click the **Folder** to navigate to the location of the file. If a database is used, the table containing the data must also be selected.
3. The program displays the records from the input file at the bottom of the screen. If the input file contains headers, the program attempts to map them to the appropriate Stone Edge fields automatically. Manually map any fields the program is not able to distinguish later in this process.
4. Click **Next** to proceed to the **Import Options** tab.
5. Change the default settings of the **Field Delimiter** field and **First Row Contains Field Names** check box as needed to match your input file.
6. Optional: to associate a supplier with those inventory records that do not already contains a Supplier Name or Supplier ID value, select one from the drop-down list.
7. Optional: To add a supplier record at this time, click **Add New** and enter basic information about the new supplier. Once added, the new supplier is listed in the **Default Supplier** drop-down list.
8. Click **Next** to proceed to the **Cost, Price & Weight** tab.
9. Under **Match Items On**, clear the field that *is not used* to determine matching records between the input file and Stone Edge, **Local SKU** or **Item Name**.
10. Under **Match Suppliers On**, if the input file contains a field with supplier name or id information, map *one* of these fields to its Stone Edge counterpart to determine how the program should match supplier records. If the file does not contain that information, it is possible to leave both fields blank and use the Supplier record selected on the **Import Options** tab instead.
11. Click **Next** to proceed to the **Finish and Import** tab.
12. Select the **Backup Before Importing** check box to make a backup copy of the program tables affected by this process. Click **Restore from Backup** on the **Select File to Import** tab if it is necessary to roll-back the changes. For example, if you discover that a field was mapped incorrectly, restore the backup, correct the field mappings and repeat the import process.
13. Optional: Click **Test Data** and the program checks for limited data errors.
14. Select **Begin Import** to start the process.
15. If a backup copy was requested, respond **OK** to the confirmation message.
16. The program provides a summary of the outcome of the import process that includes a count of any new records added and existing records edited.
17. Click **OK**.

Import Customers

From an external file

The Stone Edge Order Manager makes it easy to import product information from a Microsoft Access (.mdb) file or a comma- (.csv) or tab-delimited text (.txt) file.

1. Go to **Main Menu > Manage My Customers > Import My Customers**.
2. Type in the path to the text file or database that contains the data to be imported, or click the **Folder** to navigate to the location of the file. If a database is used, the table containing the data must also be selected.
3. The program displays the records from the input file at the bottom of screen. If the input file contains headers, the program attempts to map them to the appropriate Stone Edge fields automatically. Manually map any fields the program is not able to distinguish later in this process.
4. Click **Next** to proceed to the **Import Options** tab.
5. Change the default settings of the **Field Delimiter** field and **First Row Contains Field Names** check box as needed to match your input file.
6. Choose the mode the import process should follow by selecting or clearing the **Match on Customer ID** or **Create New Customers** check boxes.
7. Click **Next** to proceed to the first page of the **Customer Fields** tab and map those fields, as needed.
8. Click **Next** to proceed to the second page of the **Customer Fields** tab and map those fields as needed.
9. If custom inventory fields are defined, click **Next** to proceed to the first page of the **Custom Fields** tab which contains custom Text and Integer customer fields. Map those fields to fields in the input file, as needed.
10. Click **Next** to proceed to the second page of the **Custom Fields** tab, which contains custom Currency and Date customer fields.
11. Select **Next** to proceed to the **Finish and Import** tab.
12. Select the **Backup Before Importing** check box to make a backup copy of the program tables affected by this process. Click **Restore from Backup** on the **Select File to Import** tab if it becomes necessary to roll-back the changes. For example, if you discover that a field was mapped incorrectly, restore the backup, correct the field mappings and repeat the import process.
13. Click **Test Data** and the program checks for limited data errors.
14. Select **Begin Import** to start the process.
15. If a backup copy was requested, respond **OK** to the confirmation message.
16. The program provides a summary of the outcome that includes a count of any new records added and existing records edited.
17. Click **OK**.

Import Suppliers

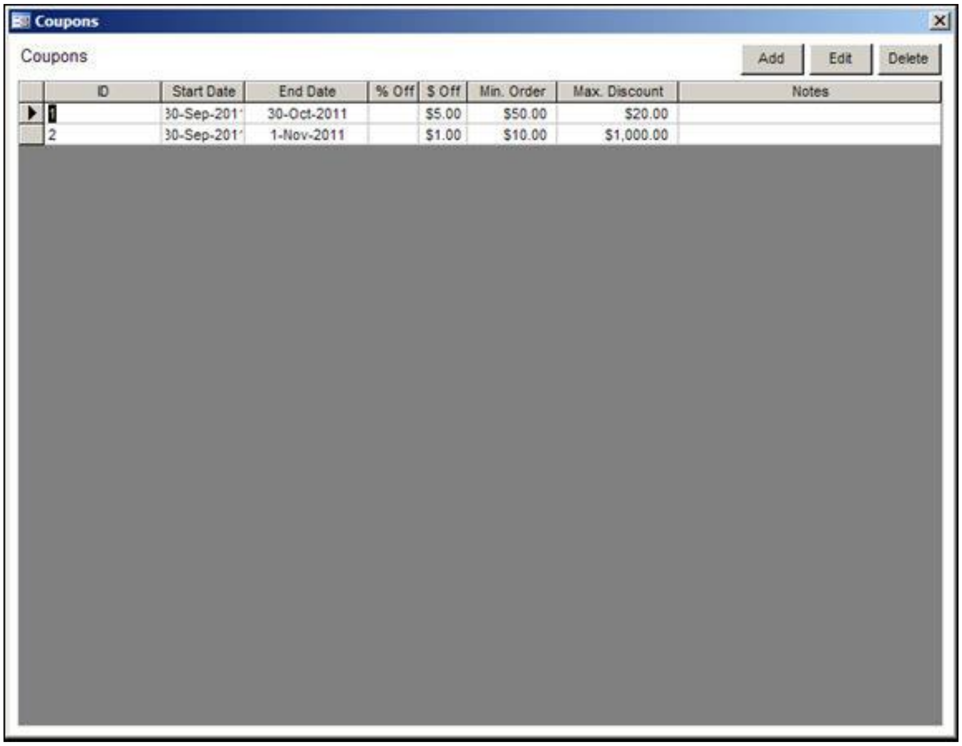
From an external file

The Stone Edge Order Manager makes it easy to import product information from a Microsoft Access (.mdb) file or a comma- (.csv) or tab-delimited text (.txt) file.

1. Go to **Main Menu > Manage My Inventory > Import My Suppliers**.
2. Type in the path to the text file or database that contains the data to be imported, or click the **Folder** to navigate to the location of the file. If a database is used, the table containing the data must also be selected.
3. The program displays the records from the input file at the bottom of screen. If the input file contains headers, the program attempts to map them to the appropriate Stone Edge fields automatically. Manually map any fields the program is not able to distinguish later in this process.
4. Click **Next** to proceed to the **Import Options** tab.
5. Change the default settings of the **Field Delimiter** field and **First Row Contains Field Names** check box as needed to match your input file.
6. Choose the mode the import process should follow by selecting or clearing the **Create New Suppliers** or **Modify Existing Suppliers** check boxes. Data from the input file is checked against the Supplier ID and Supplier Name values in existing Supplier records.
7. Click **Next** to proceed to the **Supplier Fields** tab and map those fields, as needed.
8. If custom supplier fields are defined, click **Next** to proceed to the first page of the **Custom Fields** tab which contains custom Text and Integer supplier fields. Map those fields to fields in the input file, as needed.
9. Click **Next** to proceed to the second page of the **Custom Fields** tab, which contains custom Currency and Date supplier fields.
10. Select **Next** to proceed to the **Finish and Import** tab.
11. Select the **Backup Before Importing** check box to make a backup copy of the program tables affected by this process. Click **Restore from Backup** on the **Select File to Import** tab if it is necessary to roll-back the changes. For example, if you discover that a field was mapped incorrectly, restore the backup, correct the field mappings and repeat the import process.
12. Optional: Click **Test Data** and the program checks for limited data errors.
13. Select **Begin Import** to start the process.
14. If a backup copy was requested, respond **OK** to the confirmation message.
15. The program provides a summary of the outcome of the import process that includes a count of any new records added and existing records edited.
16. Click **OK**.

Managing Coupons

The Stone Edge Order Manager allows you to configure coupons for use in their store. Creating a coupon is a way of giving customers a flat or percentage discount that they must redeem within a certain time period. These coupons can be redeemed for manually entered orders or orders created at the Point of Sale (POS). Manage coupons by navigating to *Main Menu > Settings > Order Functions > Coupons* and clicking the **OK** button. The system displays the existing **Coupons**:

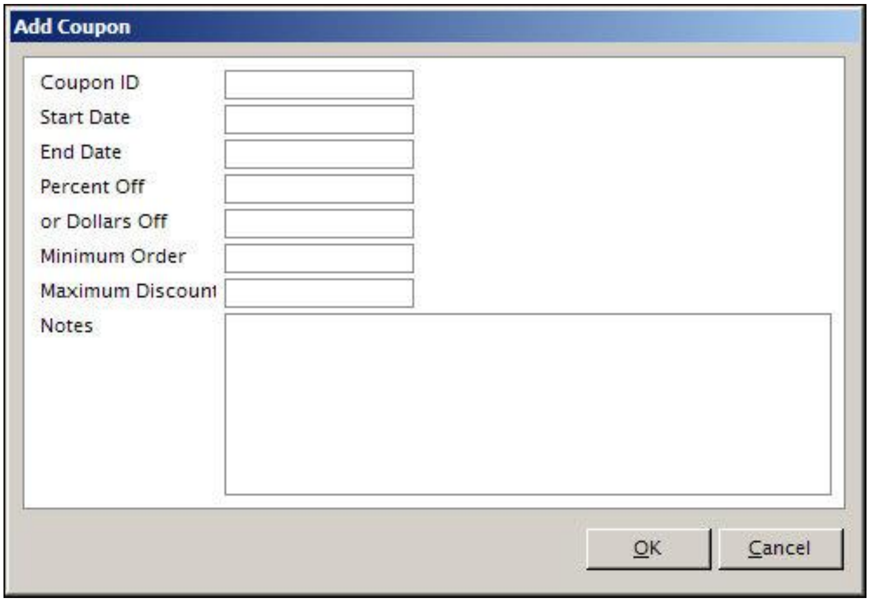


You can delete a coupon from the system by selecting it and clicking the **Delete** button. The system displays a confirmation dialog. Click the **OK** button to confirm the coupon’s deletion.

Adding or Editing Coupons

Complete the following steps to manage the coupons:

1. Access the **Coupons** window. *Main Menu > Settings > Order Functions > Coupons*
2. To create a new coupon, click **Add**.



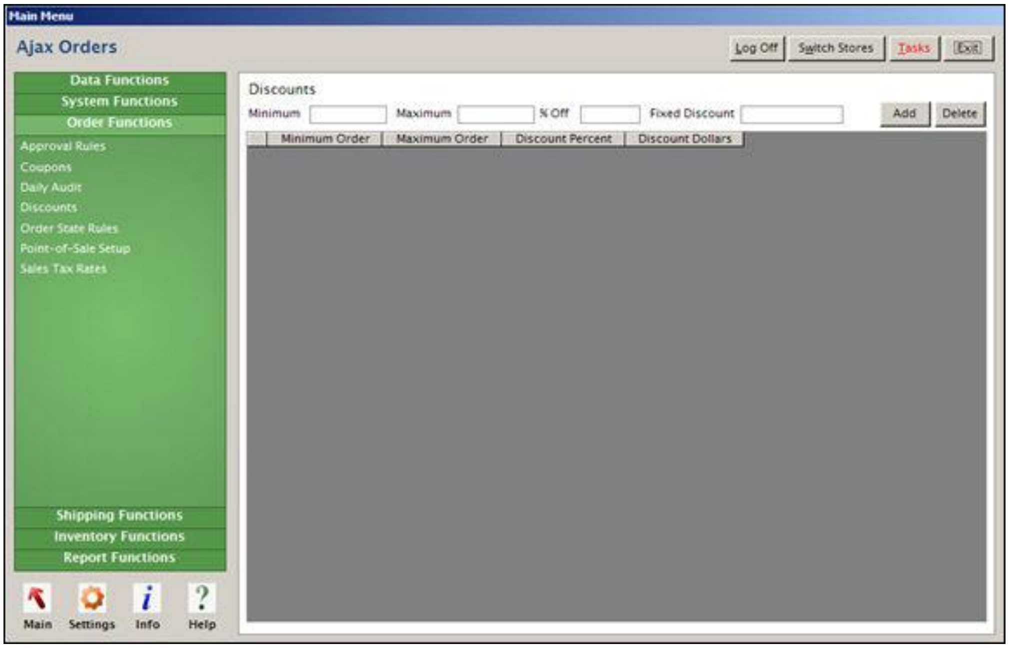
***Note:** It is also possible to select a coupon and click the **Edit** button. In that case, the system displays the **Edit Coupon** window, similar to the one shown above.*

3. Enter a **Coupon ID**. This is an arbitrary label for the coupon (SKU) that will be created.
4. Enter a **Start Date** and an **End Date** for when the coupon is valid.
5. Enter a **Percent Off** or **Dollars Off** amount, depending on your choice of coupon.
6. Enter a **Minimum Order** value for the coupon. The coupon is not valid on orders below this value.
7. Enter a **Maximum Discount**. If this is a percentage coupon, the actual discount on the order cannot exceed this amount.
8. Enter any **Notes** for the coupon. This could contain a full description of the discount and any limitations or comments.
9. Click the **OK** button.

The system creates a coupon with the chosen characteristics.

Managing Discounts

The Stone Edge Order Manager lets you create discounts for orders. These discounts only apply to Manual Orders and POS (Point of Sale) orders. Manage order discounts by going to *Main Menu > Settings > Setup Functions > Discounts*. The system displays the **Discounts** screen:



You can create flat dollar amount discounts or percentage discounts for orders processed by your store. To delete a discount, simply select it and click the **Delete** button. The system displays a confirmation dialog. Click the **OK** button to confirm the discount's deletion. If you wish to edit a discount, you must delete it and create a new one.

Creating Order Discounts

Complete the following steps to create discounts for your store:

1. Open the **Discounts** window. *Main Menu > Settings > Setup Functions > Discounts*.
2. Create an order range to which the discount will apply by entering a **Minimum** and **Maximum** value.
3. Enter a **% Off** or **Fixed Discount** amount, depending on the type of discount you wish to create.
4. Click the **Add** button. The system creates the discount.

Checking Notes and Tasks

The Stone Edge Order Manager can store notes with any customer, order, supplier, or product record. It can also store general notes that are not associated with any of those records. Notes can be entered manually or automatically by the program (e.g., when changes are made to an order). When the security system is active, you can assign tasks to a specific user. Notes do not require the Security system to be turned on.

Each of the screens listed below allows you to add or view notes.

- **View Notes & Tasks** – Go to **Main Menu > Tasks**. The task list can also be opened from almost anywhere in The Stone Edge Order Manager by pressing the CTRL+Shift+T keys simultaneously. This is the “main” notes screen where all types of notes or tasks can be created or viewed.
- **Order Records** – **Main Menu > Process My Orders > View and Process My Orders > Notes.** Create and view notes associated with orders.
- **Customer Records** – Go to – **Main Menu > Manage My Customers > View and Manage My Customers > Notes**. Create and view notes associated with customers.
- **Inventory Records** – Go to – **Main Menu > Manage My Inventory > View and Manage My Inventory > Notes.** Create and view notes associated with inventory.
- **Supplier Records** – Go to **Main Menu >Manage My Inventory > Manage My Suppliers > Notes** tab. Create and view notes associated with Suppliers.

The Stone Edge Order Manager can be configured to add notes to order records automatically when an order-related event occurs. For example, it is possible to tell The Stone Edge Order Manager to add a note to an order record after an order confirmation email is sent to the customer. The body of the email is stored in the note so you can review it at a later date. For information on setting the system parameters related to Notes, see the Knowledge Base article, ***Notes***.

Viewing Selected Notes or Tasks

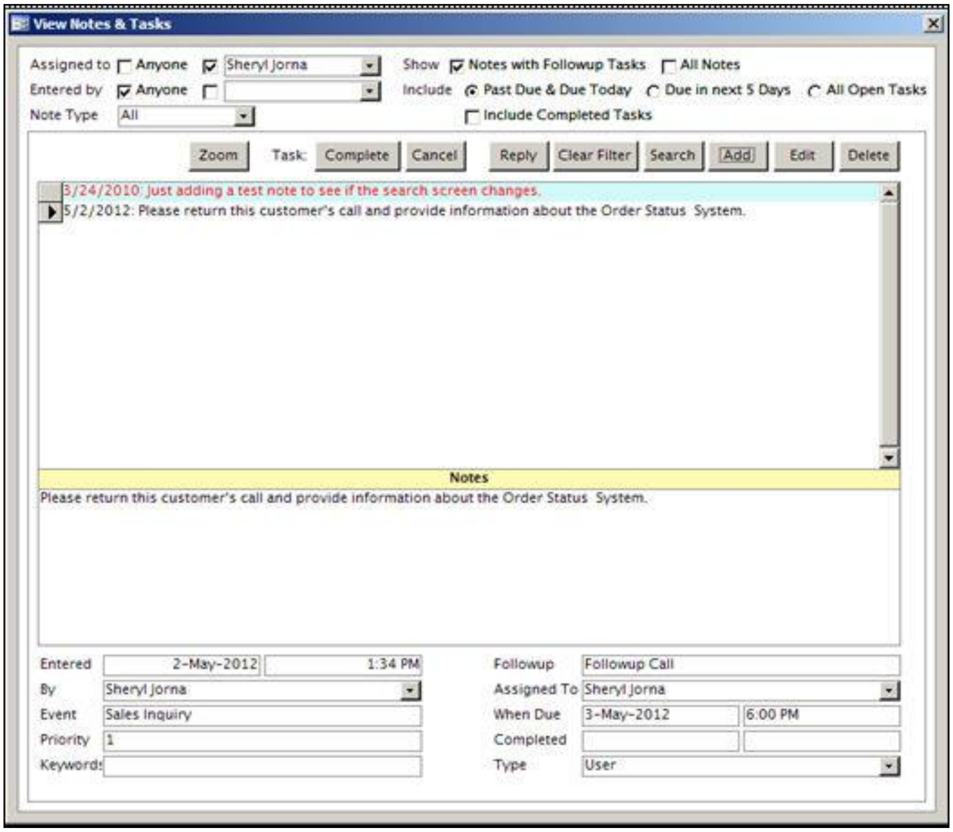
Complete the following steps to view existing **Notes** or **Tasks**:

1. Click **Tasks** on the Main Menu or press control/shift/t from almost anywhere in The Stone Edge Order Manager and the **View Notes & Tasks** window appears.
2. Check the box for **Assigned to:** or **Entered by:** to view notes and tasks associated with a specific user name. Click the down arrow to select the name from the associated drop-down list.
3. Select the desired **Show:** options at the upper right of the window (**Notes with Followup Tasks** or **All Notes**).
4. Select the desired **Include:** options (**Past Due & Due today**, **Due in the Next 5 Days**, **All Open Tasks**, or **Include Completed Tasks**).
5. All of the notes and tasks matching the specified criteria appear in the lower left-hand portion of the screen, regardless of where they were created.

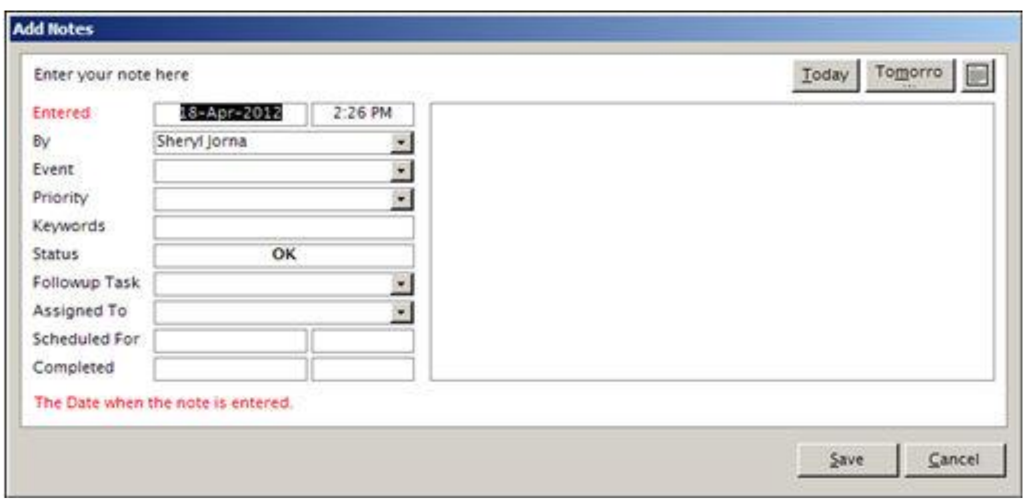
Adding or Replying to Notes & Tasks

Complete the following steps to add or reply to a note or task:

1. Go to a location in the program where Note and Tasks can be viewed (see the beginning of this section for more details). If at the main **View Notes and Tasks** screen, enter the desired criteria to produce a list of notes and tasks. Otherwise, skip to step 3.
2. The **View Notes & Tasks** window or **Notes** tab appears:



3. Click the **Add** button and enter the pertinent information. If replying to a note, select the note or task from the list and click the **Reply** button. The **Follow Task** field will be set to **Read this note** automatically. Enter or alter the desired information. Use the **Task Completed** or **Cancel Task** buttons to easily mark a note or task as completed or closed.
4. When finished, click the **Save** button.

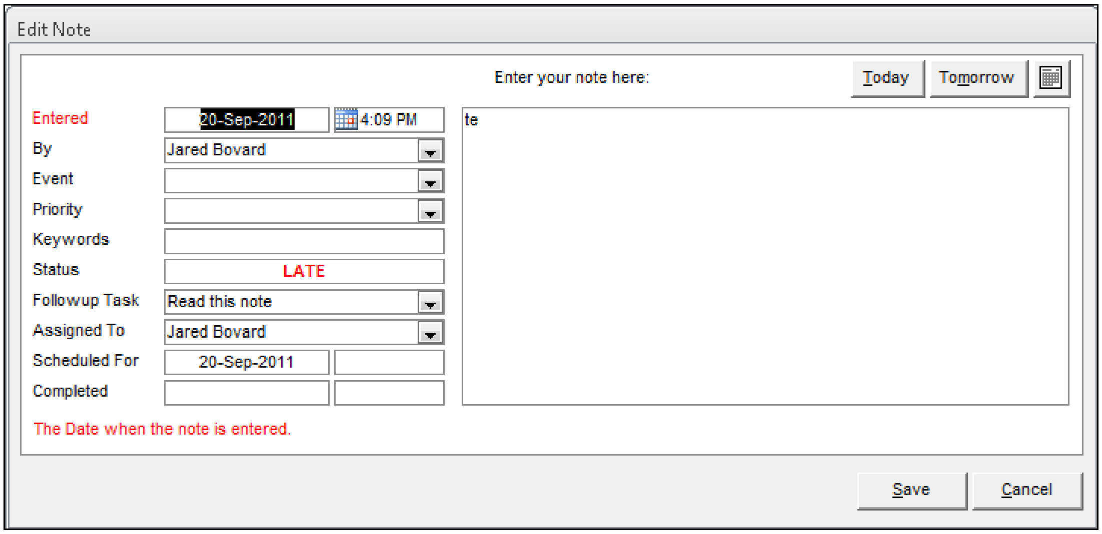


Editing Notes & Tasks

Complete the following steps to edit (update) a note or task

1. Go to a location in the program where Notes and Tasks can be viewed (see the beginning of this section for more details). If at the main **View Notes and Tasks** screen, enter the desired criteria to produce a list of notes and tasks. Otherwise, skip to step 2.

2. Select the note or task to be updated from the list in the lower left-hand box on the form and click the **Edit** button.
3. The **Edit Note** window appears:

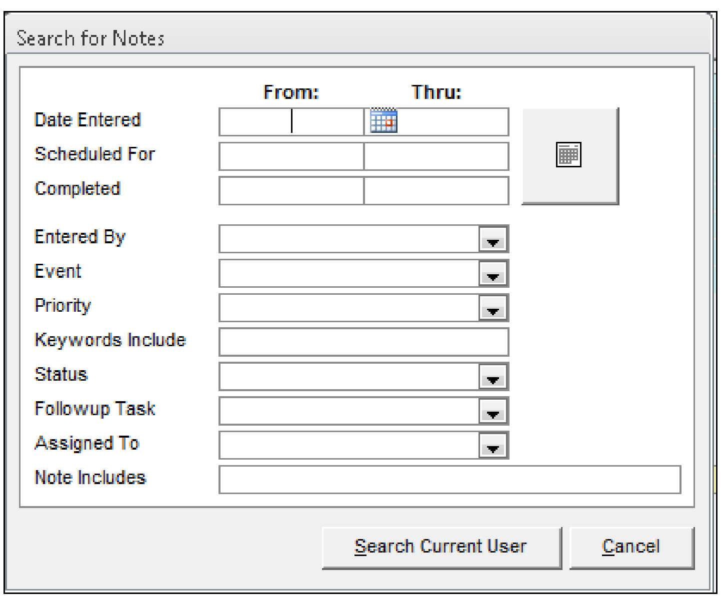


4. Add another note or alter other information. Use the **Task Completed** or **Cancel Task** buttons to easily mark a note or task as completed or closed.
5. Click the **Save** button when finished. The new note or response is added to the system.

Searching for Notes & Tasks

Complete the following steps to search for a note or task:

1. Go to a location in the program where Notes and Tasks can be viewed (see the beginning of this section for more details).
2. Click on the **Search** button. The **Search for Notes** window appears:



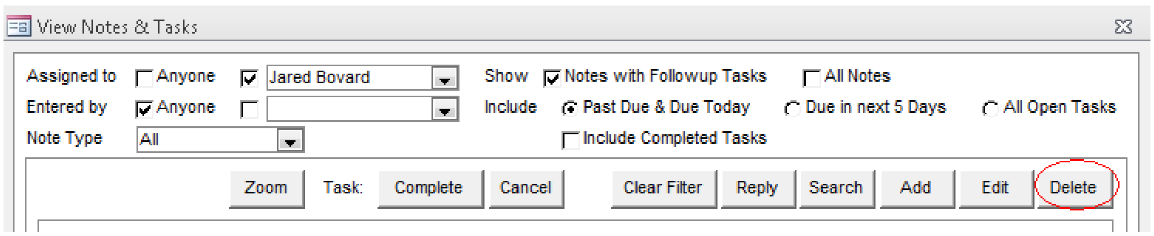
3. Enter the desired search criteria. Select **Search Current User**.
4. The program returns a list of note or tasks that match the search criteria. Select a note or task from the list to be viewed or updated.

5. To remove the search criteria and start over, click the **Clear Filter** button on the View Notes & Tasks screen.

Deleting Notes

In order to display the **Delete** button on all the notes/tasks screens, you must first set a System Parameter.

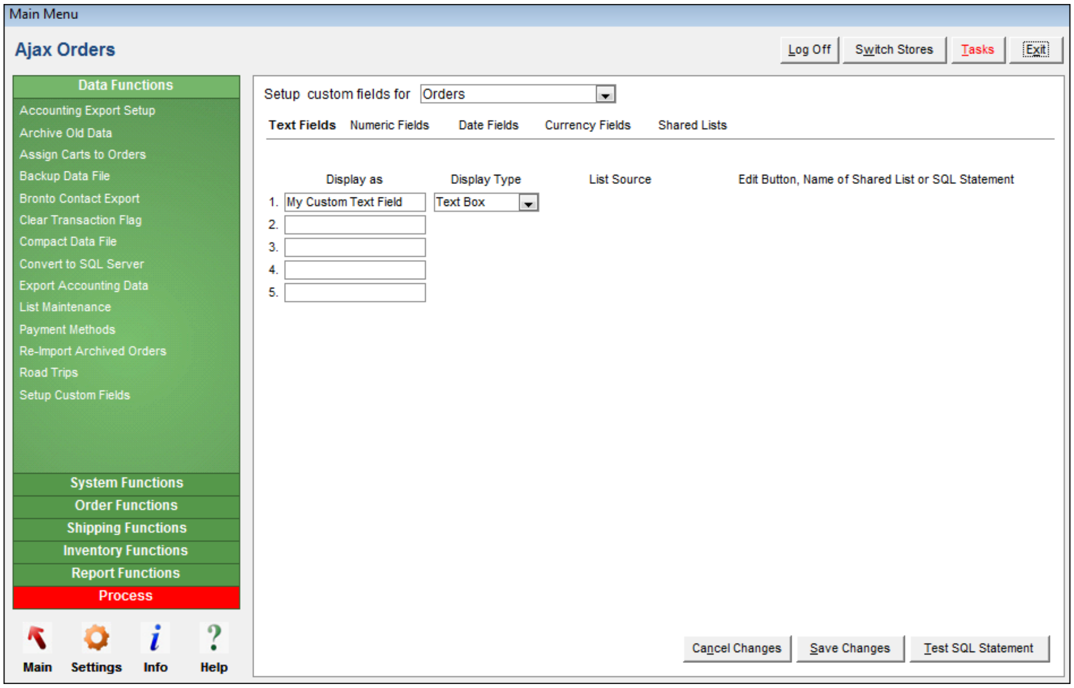
1. Go to **Main Menu > Settings > System Functions > System Parameters**.
2. In the Parameter Group box, select **Security**, then select **AllowDeleteNotes**.
3. Set the Parameter Value to TRUE and click **Save**.
4. The **Delete** button becomes visible.



Managing Custom Fields

Fields store individual pieces of information (product name, price, cost, customer name, etc.) in The Stone Edge Order Manager. Related fields combine to create a “record”. A record might represent an individual customer, supplier or product, or one line item from an order. A collection of similar records is called a “table”, such as Customers, Orders or Suppliers. In addition to its standard fields, The Stone Edge Order Manager allows for the creation of up to twenty custom fields in the Order, Order Detail, Customer, Product, and Supplier tables. Those fields appear in the **Custom Fields** tab of their respective windows (e.g., **Custom Order** fields appear in the **Process Orders** window, **Custom Supplier** fields appear on supplier records, and so on).

In each case, it is possible to create up to five fields of each type: text, numeric, date, and currency. The **Custom Field Setup** screen is where you configure the appearance and functionality of these fields. Go to *Main Menu > Settings > Setup Functions > Setup Custom Fields.*



***Note:** Custom fields can also be defined and labeled using the **Set System Parameters** window (search "custom"); however, it is only possible to define them as text boxes, not as drop-down lists or SQL Statements there.*

Different fields appear based on the field type or display type that is chosen. The following is a brief explanation of display options:

Display as – This sets the label for the custom field. Use a short name (e.g. Referred By or Company Contact) that will uniquely identify the meaning of that field.

Display Type – A **Text Box** allows type text and/or numbers to be entered into the custom field. A **Combo Box** (also known as a "drop down list") forces you to select the field entry from a pre-defined list that is entered at the Custom Field Setup screen. For numeric fields, a **Check Box** can be selected.

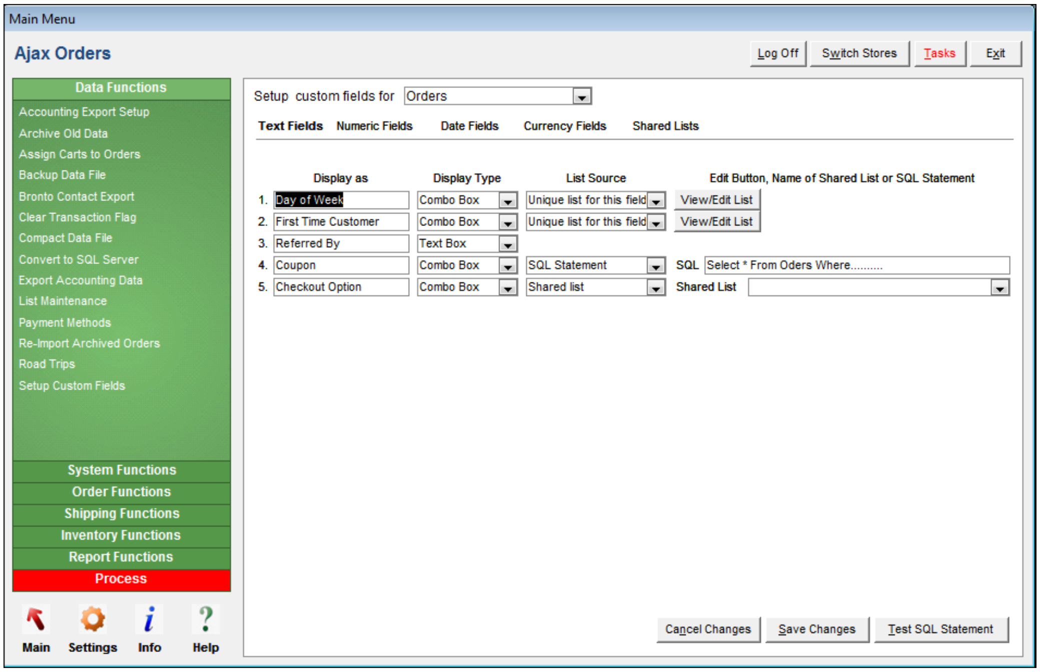
List Source – For Combo Boxes only – Specify the kind of list to supply the data for this field.. There are three options:

- **Unique List** – A list of options that will only be used for the current custom field. Refer to ***Creating a List*** below.
- **Shared List** – A list of selections that can be used for any custom text or numeric fields. Refer to ***Creating a List*** below.
- **SQL Statement** – Enter an SQL select statement that populates the list. The SQL statement should be in the form "**SELECT FieldName FROM TableName**" or "**SELECT FirstFieldName, SecondFieldName FROM TableName**". It can also include a **WHERE** clause and an **ORDER BY** clause, such as "**SELECT CustomerID, FullName FROM Customers WHERE state='pa' ORDER BY FullName**". If there are two fields in the SQL statement, the first field will be stored, and the second field will be displayed. For instance, it is possible to display supplier names, but store their supplier IDs. Once an SQL statement has been entered, click the **Test SQL Statement** button at the top of the screen to validate the statement.

Date Format – For date fields, select one of four different ways to display the date entered.

Defining Custom Fields

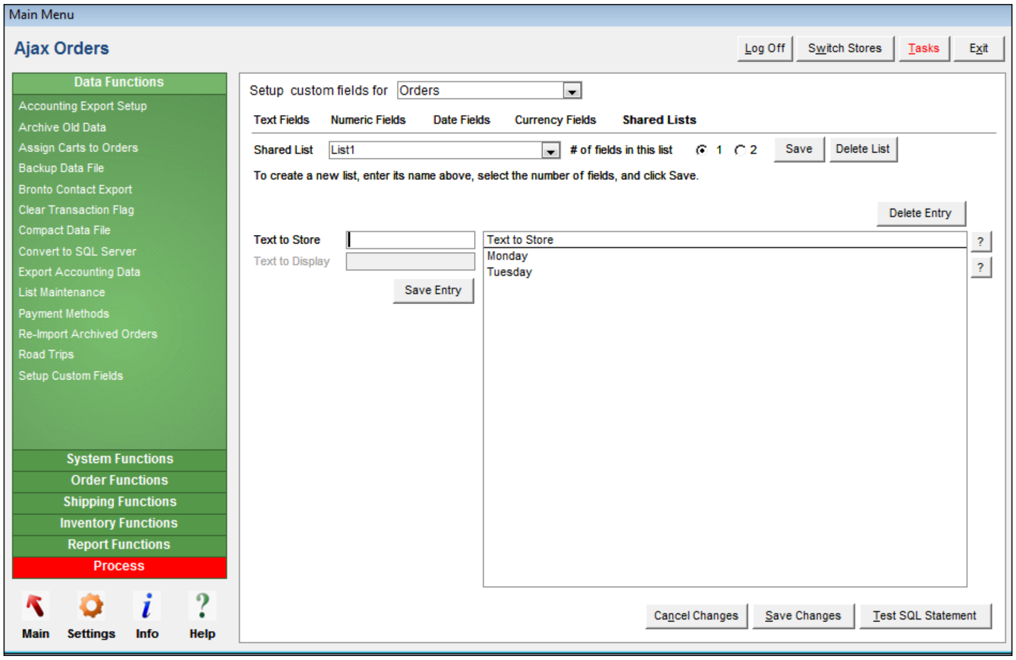
1. Navigate *to Main Menu > Settings > Setup Functions > Setup Custom Fields.*



2. Select the type of custom fields (Order, Order Detail, Customer, etc.) to create from the **Setup custom fields for:** drop-down list at the top of the screen.
3. Choose the tab of the data type of fields you want to define.
4. Enter a label for the field in the **Display as** field. Use a short name (e.g. Referred By) that will uniquely identify the meaning of that field.
5. Select the **Display Type**. Each type of custom field (text, numeric, date or currency) will have different Display Type options.
6. If a **Combo Box** is selected**,** also select a **List Source**. This can be a unique list, a shared list, or an SQL statement. If a unique or shared list is selected, the shared list will have to be defined. Refer to ***Creating a List,*** below.

Creating a List

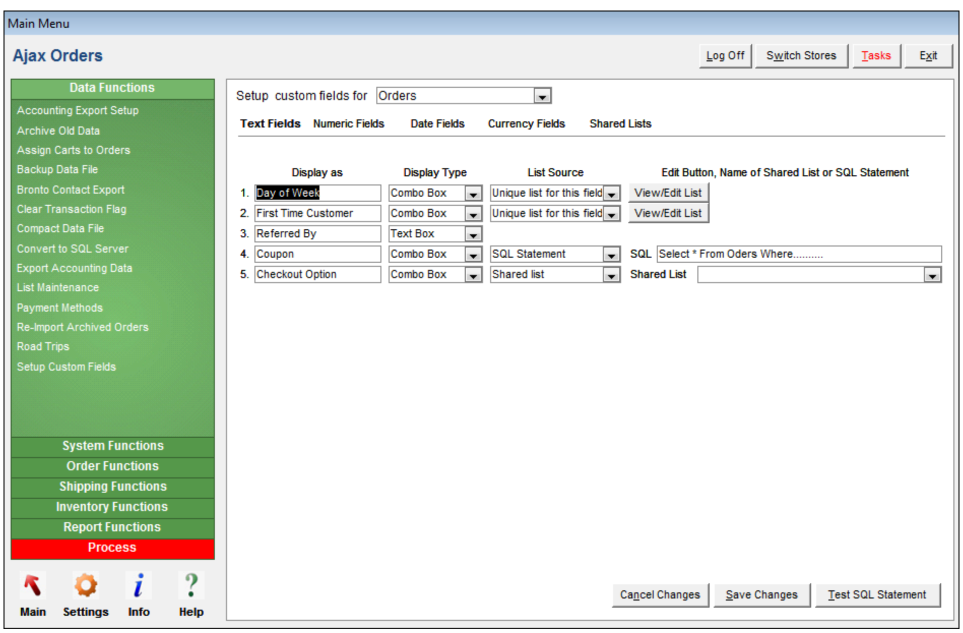
If a custom field is defined as a Combo Box, you must also define the list of data it contains. Whether it will be a unique list or a shared list, the process is generally the same.



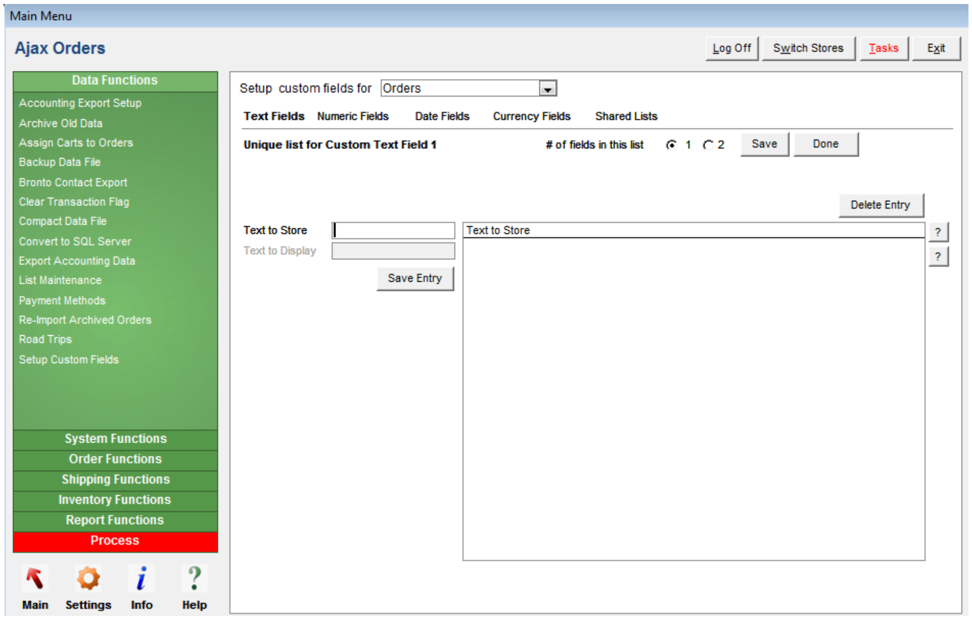
1. Choose the type of list you want to create:

    a) If you are creating a shared list, click on the **Shared List** tab and enter a name for the **Shared List** and click the **Save** button.

    b) If you are creating a unique list, click on the **Text or Numeric Fields** tabs. Next to fields **1-5**, choose a **Display Type** of **Combo box** and then select **Unique list for this field** from the **List Source** drop-down list.



c) Click the **View/Edit List** button. Unique lists do not require you to enter a name.



2. Click the radio button that reflects the number of fields that will be included in the list (**1 field** or **2 fields**).

3. For each unique list per Custom Text Field, enter the **Text to Store** (and **Text to Display**, if the **2 fields** radio button is selected) data and click the **Save** button. The system adds the entry or entries to the list on the right.

4. The order that the entries appear in can be altered by clicking the **Up** or **Down** buttons.

5. When creating a unique list, click the **Done** button when finished adding data to the list.

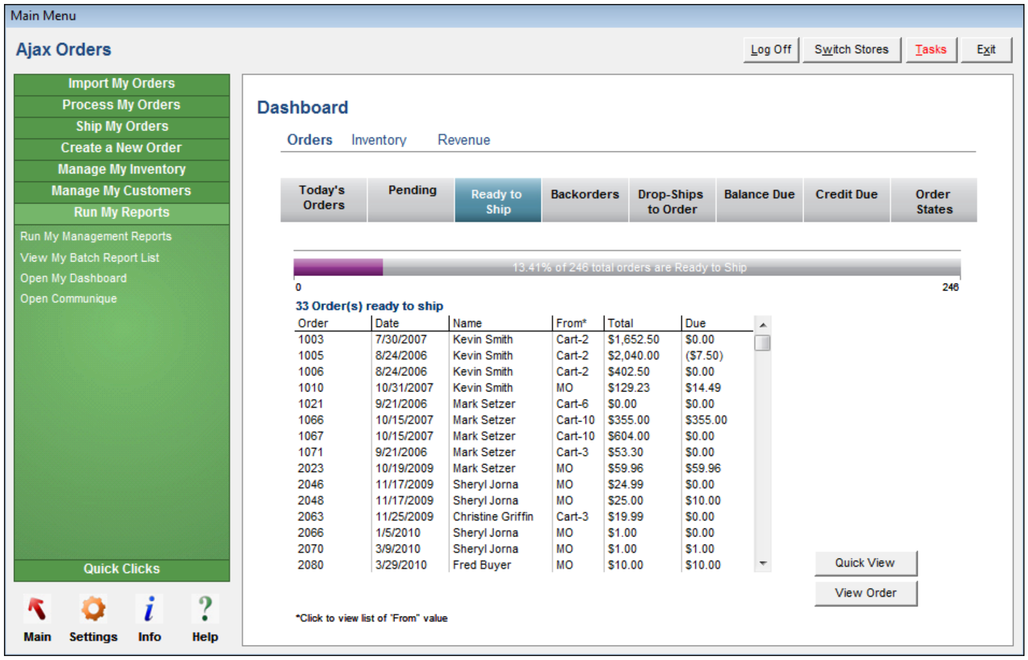
Shared lists can be used for any field that can be displayed as a combo box as long as they adhere to the standards of the entry type for the custom field. For example, do not create a list of text entries for a custom numeric field.

Dashboard

The Dashboard displays vital information about different aspects of their business in a single, concise screen. The Dashboard can be accessed by going to *Main Menu > Run My Reports > Open My Dashboard.*

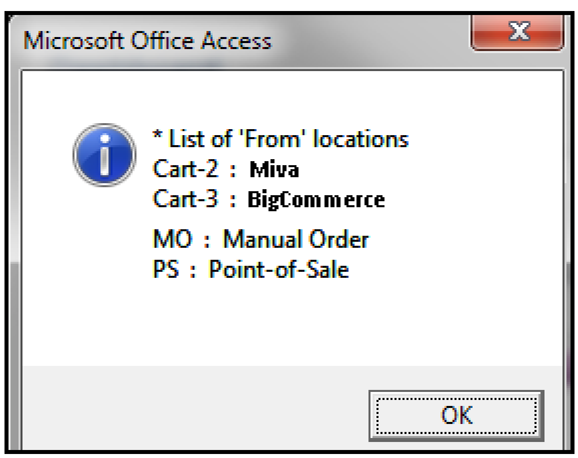
Note: *Dashboard data can be hidden from users who should not have access to this information by using The Stone Edge Order Manager's Security system.*

When the **Dashboard** is opened, the store's total number of orders is displayed on the bar. Select **Today's Orders** or one of the other buttons to see a list of orders which fall into that category. Likewise, select the **Inventory** or **Revenue** tabs to view that type of data in a similar fashion.



Quick View shows the items on a selected order, while **View Order** opens the Process Orders screen to view all information about the order.

Click to view list of From values opens a legend mapping the cart ID to the name of the cart.



The Stone Edge Order Manager Security

The Stone Edge Order Manager's security system lets you control which users have access to various options and functions within the program.

Note: *This is **NOT** a high-security system. It will **NOT** prevent a knowledgeable Microsoft Access user from disabling or working around the system. It is designed to control how different users view and use the program.*

The following sections will help you to set up security and manage user access to The Stone Edge Order Manager:

Security Definitions

Enabling Security

Managing Users

Managing User Groups

Logging in to The Stone Edge Order Manager

Security Definitions

Security: If Security is turned **on**, a User account and password must be created for each individual who needs access to the program.   The Stone Edge Order Manager. Security settings are unique to **each** Order Manager store. If you have more than one Stone Edge Order Manager store, the security system needs to be setup separately in each store.

Users: Create a **User account** for each employee who uses The Stone Edge Order Manager. User accounts do not have permissions assigned directly to them. Instead, they inherit the permissions of the **Group(s)** to which they belong.

Note*: If you use Notes or Tasks and wish to record who enters a note, who assigns a task, and to whom a task is assigned, a list of users must be created. It is possible to create users even if the Security system is not turned on.*

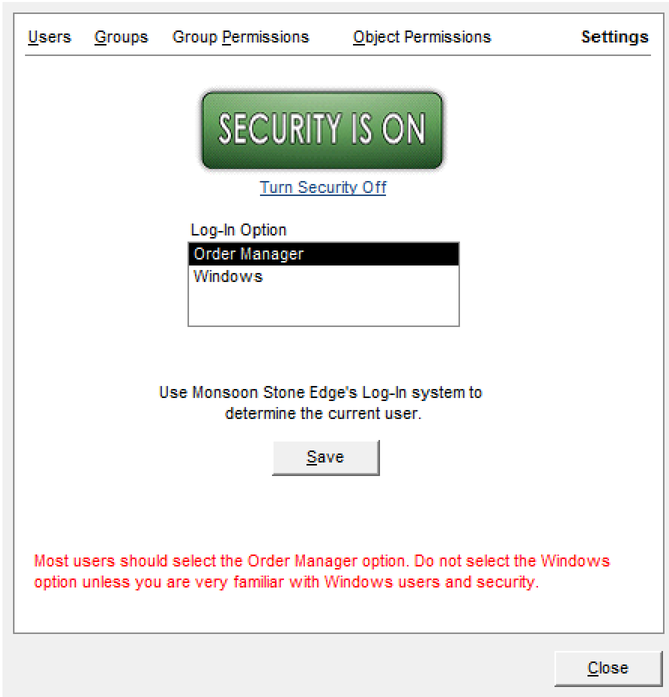
Groups: Create whatever Groups are needed (Cashiers, Packers, etc.) and assign each user to one or more Groups. The Admin Group always has all permissions. Other Groups can be given permission to use specific forms, buttons, reports, etc.

Permissions: Permission is required in order to access certain screens, buttons, reports, and other features if Security is turned on. Permissions are assigned to Groups. If a specific set of Permissions needs to be assigned to just one user, create a Group for that user, set up its Permissions, and only assign the one User to that Group.

Log-In System: If Security is turned on, The Stone Edge Order Manager needs to know how it should validate users before allowing them access. It can get that information from one of two ways: the Windows login or The Stone Edge Order Manager's own Security system (which is the preferred option).

Enabling Security

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window:



***Note:** If Security is disabled, you only see the **Settings** and **Users** tabs. Users can be defined even if the rest of the security system is not being used.*

2. To enable Security, select **Turn Security On**. To disable Security, select **Turn Security Off**.

***Warning**: Once enabled, any changes made to Security System settings take effect immediately. Be very careful when making changes. It would be wise to make a backup copy of the data file before implementing the security system or making significant changes to permissions. A user must have sufficient security permissions to disable the security system once it is turned on.*

3. Select a **Log-In Option**. Choose **Order Manager** to log-in with a **Stone Edge Order Manager** User ID, or **Windows,** to use Windows authentication to authenticate users. Stone Edge Technologies, Inc. recommends using the **Order Manager** option.
4. Click the **Save** button.

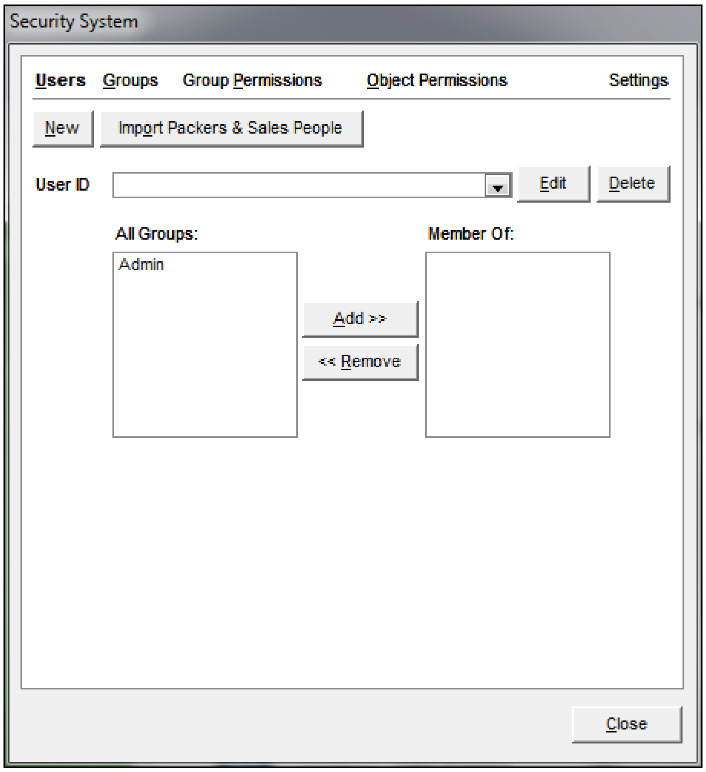
When security is enabled for The Stone Edge Order Manager, the system displays three additional tabs on the **Security System** window: **Groups**, **Group Permissions**, and **Object Permissions**.

Managing Users

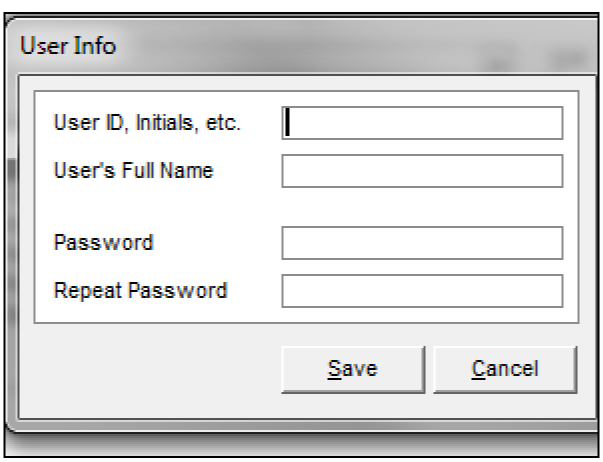
The **Security Settings** window allows you to create, edit, and delete the users who have access to The Stone Edge Order Manager. Assign or deny certain privileges for users by creating User Groups. Refer to *Managing User Groups*, below, for more information.

Creating a User

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Users** tab.



3. Click the **New** button. The system displays the **User Info** dialog box:



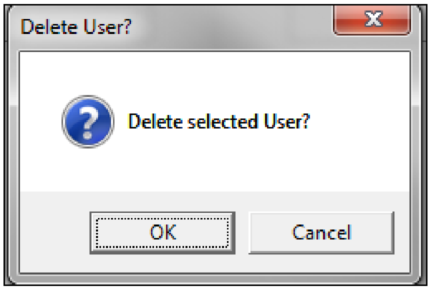
4. Enter a **User ID**, the **User's Full Name**, and a **Password**. **Repeat** the password to verify that it was entered correctly.
5. Click the **Save** button. The system adds the user to the system and displays it in the drop-

down list of users.

The new **User ID** and **Password** can be used to log in to The Stone Edge Order Manager.

Deleting a User

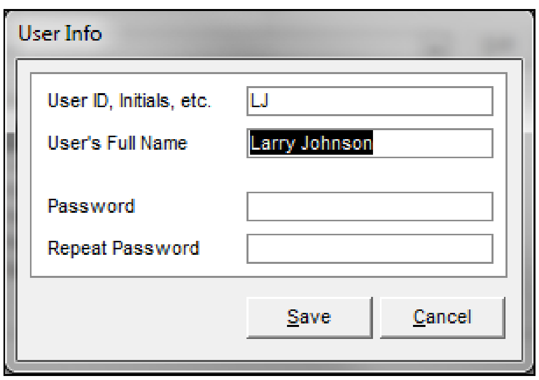
1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Users** tab.
3. Select a user from the **User ID** drop-down list.
4. Click the **Delete** button. The system displays the following dialog box:



5. Click the **OK** button. The Stone Edge Order Manager removes the selected user from the system.

Editing a User

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Users** tab.
3. Select a user from the **User ID** drop-down list.
4. Click the **Edit** button. The system displays the **User Info** window:



5. Edit the record as needed and click the **Save** button.

Managing User Groups

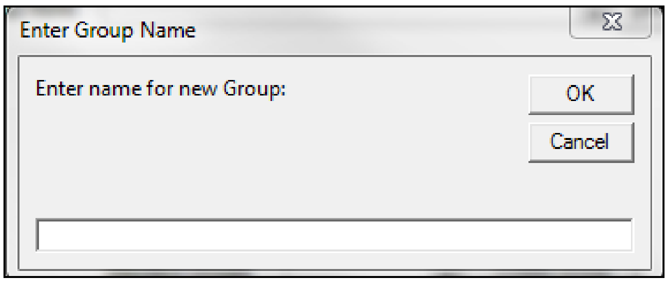
User Groups allow you to control who can use certain screens, buttons, reports, etc. within The Stone Edge Order Manager.

You can create custom user groups or base them off of the standard User Groups that are supplied with the program in order to quickly assign permissions to users. The four user groups provided by The Stone Edge Order Manager and their Access levels are as follows:

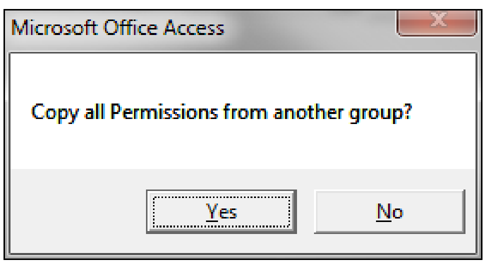
User Group	Recommended Access
Cashiers	Access to the Point of Sale system only
Packers	Access to the Pack & Ship system only
Power Users	Access to all systems except Security System
Sales People	Most Main Menu options are accessible, but only a few maintenance tasks are accessible from the Settings menu.

Creating a User Group

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Click the **Groups** tab.
3. Click the **New** button. The system displays the **Enter Group Name** dialog box:

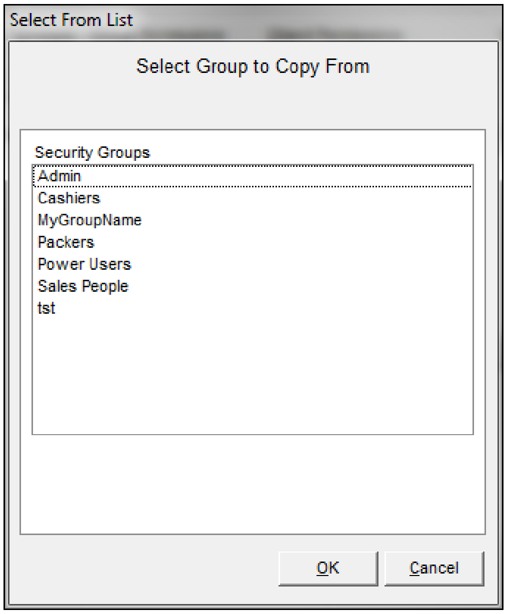


4. Enter a name for the new group and click the **OK** button.
5. The system asks whether to copy permissions from another Group:

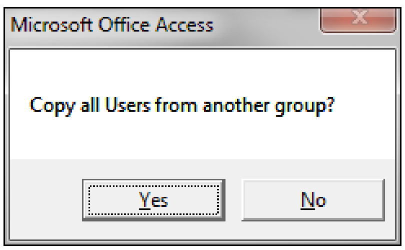


6. Click the **Yes** or **No** button.
   a. If **No** is selected the dialog ends and the group is created with minimal permissions**.** A member of the Admin security group can manually tailor the permissions for this group from the **Group Permissions** tab of the **Security System** window later.

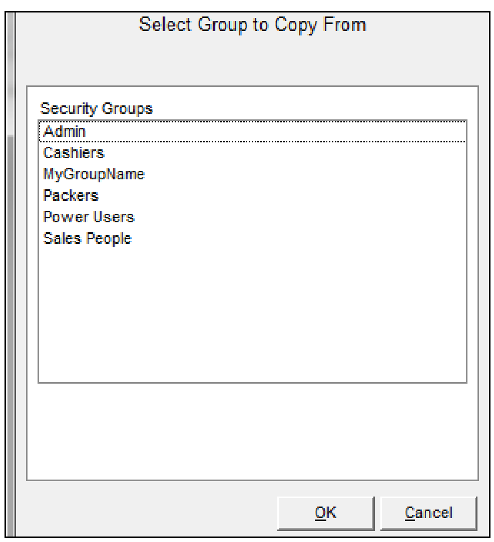
b. If **Yes** is selected, the system prompts for the Group name from which the permissions should be copied. Select the appropriate group and click the **OK** button.



c. Next the program will ask whether to copy all users from another group.



- If **No** is chosen, the dialog ends and users can be manually assigned to the new group from the Users tab at a later time.
- If **Yes** is chosen, the system prompts for the name of the Group from which users should be copied. All users in the selected group will be added to the new group as well. Individual users can be manually deleted from the new group via the Users tab, if necessary.



- Select the desired group and click the **OK** button. All of the users in the selected group have now been added to the new security group and are subject to the least restrictive permissions of both groups.

Adding a User to a Group

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Users** tab.
3. Select a user from the **User ID** drop-down list.
4. Select a group from the **All Groups:** list.
5. Click the **Add** button. The selected group will now appear in the **Member of**: list. The user has been added to that Group and will have the same permissions as other users in that Group. To view the permissions of a particular security group, choose one of the **Print Report** buttons on the **Groups** tab.

Deleting a User from a Group

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Users** tab.
3. Select a user from the **User ID** drop-down list.
4. Select a Group from the **Member Of:** list.
5. Click the **Remove** button. The selected user will be removed from the Group and will no longer have the access rights associated with that Group.

Deleting a User Group

1. Navigate to *Main Menu* > *Settings* > *System Functions* > *Security Options*. The system displays the **Security System** window.
2. Select the **Groups** tab.
3. Select a user group from the **Group Name** drop-down list.
4. Click the **Delete** button and click **OK**. Only the user group definition is deleted, user ids are not affected.

Assigning Group Permissions

The Stone Edge Order Manager allows an administrator to define the permissions for each User Group. User Group permissions are assigned to objects. Below are the types of objects that you can define. These objects can be defined for nearly any form or process in The Stone Edge Order Manager.

Object	Options
Form	Forms are the windows within The Stone Edge Order Manager: Main Menu, Manual Orders, MOV, Packing, POS, View Inventory, and Process Orders. Access to each window can be restricted or allowed with the following permissions: 1. **No Access** – user cannot access 2. **Normal Access**
Form Control	These are the buttons or controls on the forms within The Stone Edge Order Manager. The controls which can be selected depend on the form. Access to each control can be restricted or allowed with the following permissions: 1. **No Access** – button is hidden 2. **Visible – Disabled** – button is visible but disabled 3. **Visible – Enabled** – button is visible and enabled
Report	The ability to run each Stone Edge Order Manager report can be restricted or permitted with the following permissions: 1. **No Access** – user cannot print report 2. **Print** – user can print report

Complete the following steps to assign an object to a Group and to control that Group's permissions within The Stone Edge Order Manager:

1. Navigate to *Main Menu > Settings > System Functions > Security Options*. The system displays the **Security System** window.
2. Click the **Group Permissions** tab.
3. Select a group from the **Select Group** drop-down list.
4. Select an **Object Type** (the type of object that you want to restrict the group's access to).
   a) If the **Form** or **Report** radio buttons are chosen, select a **Form** or **Report** from the drop-down list (the specific object for which access will be restricted or allowed). Skip to step 5.
   b) If **Form Control** was selected as the **Object Type**, select a **Form** from the drop-down list and then also choose an item from the **Select Button or Option** drop-down list.

   Note: *Click **Enable All Buttons** to let users in the selected group use all of the buttons on a form. Click the **Hide All Buttons** button to hide all of the buttons on a form from the group's users. Individual buttons or options can be enabled or hidden as needed afterwards.*

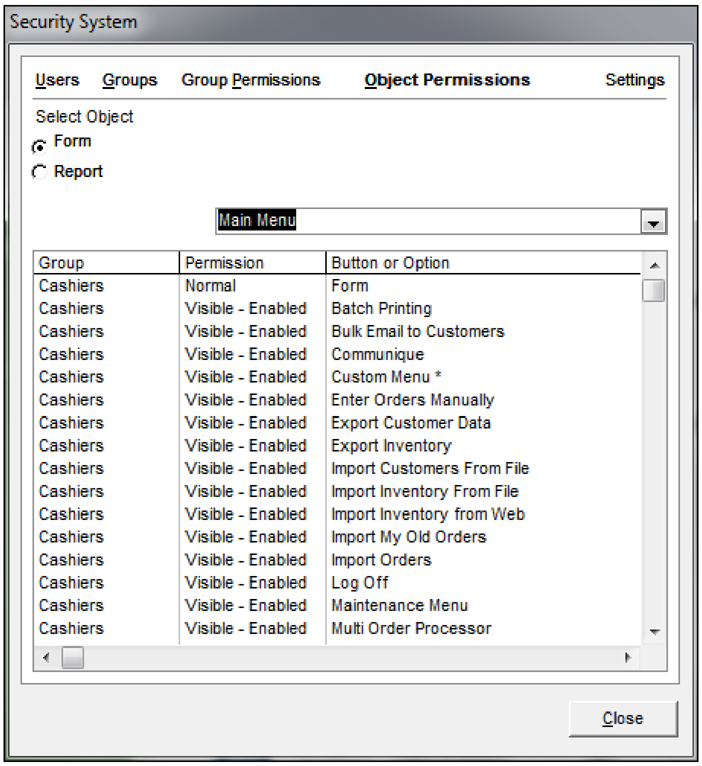
5. Select a **Permission** level for the selected form, control, or report (**No Access**, Visible-Disabled, Visible-Enabled).

6. Click the **Save Permission** button.

Note: *To remove all permissions for the selected object from the current group, click the* ***Remove Permissions for Current Form, Report or Object*** *button at the bottom of the screen. To copy the current group's permissions to all forms, click the* ***Copy Current Group and Permissions to all Forms*** *button (only available if the* ***Object Type*** *is* ***Form****).*

Viewing Permissions

To display all of the permissions for a form or report, go to the **Object Permissions** tab on the **Security System** window. Select the object type (**Form** or **Report)**, and then choose a form or report from the drop-down list. The system displays all of the permissions for the selected object and all of the controls on that object for all of the User Groups defined. Use the vertical and horizontal scroll bars to navigate through the list.



Logging into The Stone Edge Order Manager

If the internal Security system is enabled, users must log in with a User ID and password. User accounts are created within The Stone Edge Order Manager Security System, or The Stone Edge Order Manager can be configured to accept users' Windows accounts for authentication. Refer to the previous section, **Enabling Security**, for more information on configuring the security options for The Stone Edge Order Manager.

If the Security feature is enabled, the system displays the Stone Edge Order Manager **Log-In** screen whenever the application is launched or when the **Log Off** button on the main menu is selected. (Log Off is only visible when the internal security system is enabled.)

Complete the following steps to log in to The Stone Edge Order Manager:

1. Enter your **User ID** and **Password** on The Stone Edge Order Manager's **Log-In** window.
2. Click the **OK** button.

The application is opened and The Stone Edge Order Manager's Main Menu is displayed.

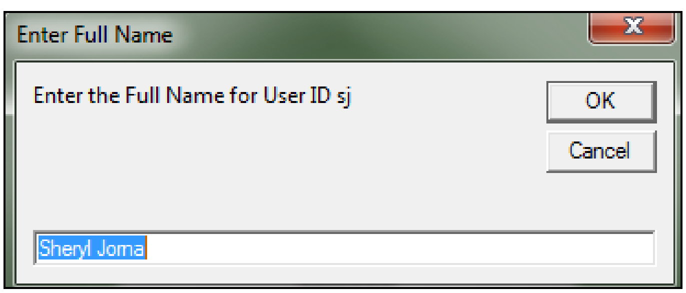
Changing a User Name or Password

Complete the following steps to change a user name or password.

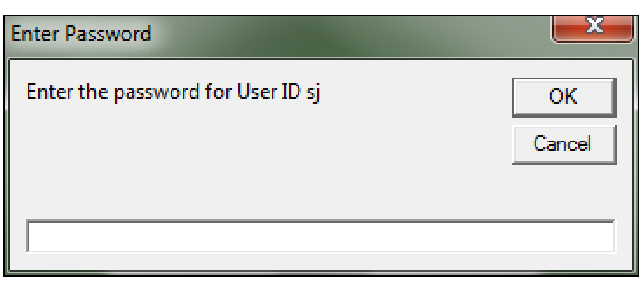
Note: *This allows the full name associated with a Stone Edge Order Manager User Account (and its password) to be changed; it does* ***NOT*** *allow you to change your User ID.*

---

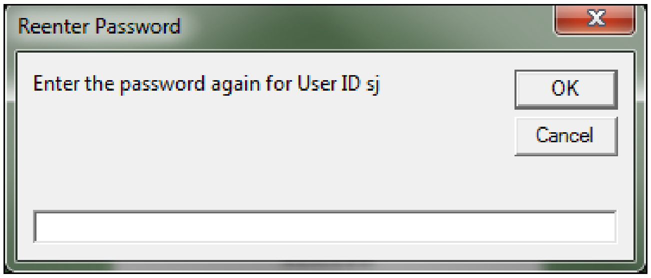
1. From the **Log-In** window, enter your **User ID** and **Password**.
2. Select the **Change Name/Password** check box.
3. Click the **OK** button. The system displays the **Enter Full Name** dialog:



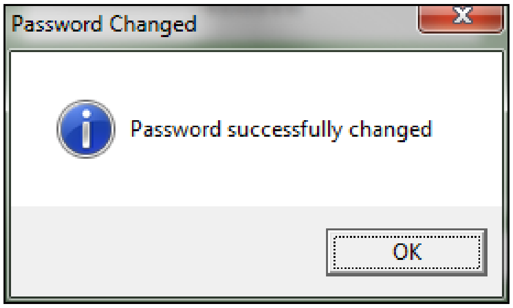
4. Enter a new name to associate with the user account and click the **OK** button. The system displays the **Enter Password** dialog:



5. Enter a new password and click the **OK** button. The system displays the **Enter Password Again** dialog:



6. Re-enter the password and click the **OK** button. The system displays the **Password Changed** confirmation:

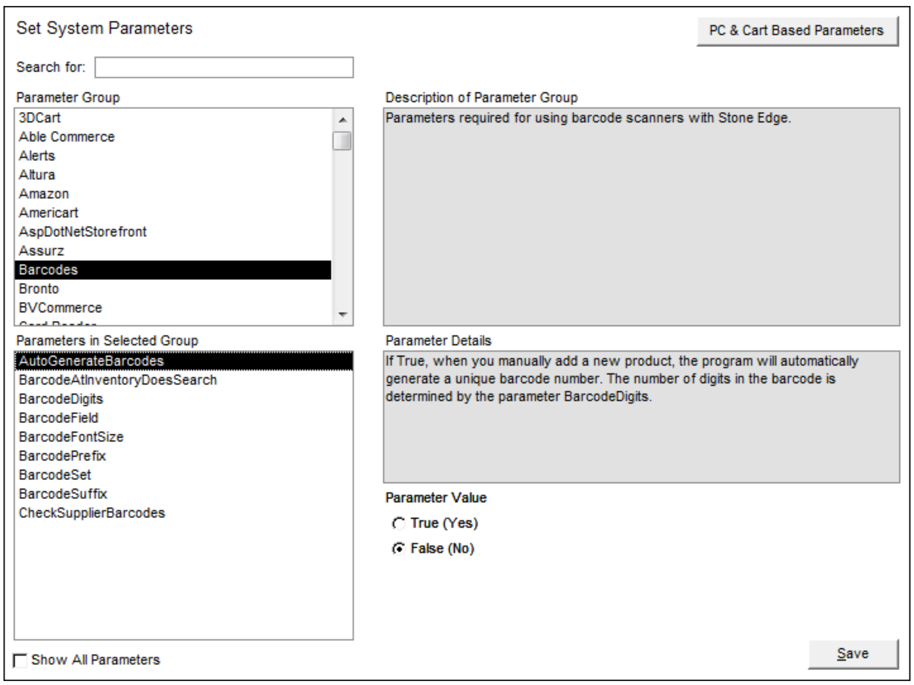


Setting System Parameters

The Stone Edge Order Manager can be tailored to the way your business operates. One way to accomplish this is through the setting of “system parameters”. The program contains hundreds of system parameters that control everything from the company information appearing on invoices, to how credit cards are processed. Some parameters get set automatically when choices are made via the **Setup Guide, Store Setup Wizard,** or setup screens. Others must be changed manually at the **Set System Parameters** screen. To make the parameters easier to work with, they are divided into Parameter Groups, such as Barcodes, Credit Cards, or Program, etc.

IMPORTANT: *It is highly recommended that you spend time familiarizing yourself with the various system parameters, as they have a direct impact on the operation and function of The Stone Edge Order Manager.*

Access the **Set System Parameters** window by clicking the **System Parameters** button in the **Quick Clicks** section of the **Main Menu** or by navigating to *Main Menu > Settings > System Functions > Set System Parameters*.



The **System Parameters** dialog box is divided into five sections. In the top left area of the form is the **Parameter Group** list. When you select a group in this box, a description of the parameter group appears in the **Description of Parameter Group** area.

All of the parameters for the selected group appear in the **Parameters in Selected Group** area directly below the **Parameter Group** list box. When a parameter is selected, a description of the parameter appears in the **Parameter Details** area.

Just below the **Parameter Details** box is the Parameter Value section of the form where the current setting of the parameter can be viewed or changed. Depending on the type of parameter selected, a text box, combo box with a list of options, or a Boolean (true/false) option is visible. Select or enter the desired value and click the **Save** button.

Refer to the online ***Knowledge Base*** for more information on setting System Parameters.

Searching for a Parameter

The **Search for:** field makes it easy to find a specific system parameter. If you know all or part of the name of a parameter, enter it in the **Search for:** field in the top of the form and press the **Tab** or **Enter** key on your keyboard. Any parameters that include the text you typed appear in the **Parameters in Selected Group** list box. For example, if you search for **ShipDate**, you will see a list of several parameters including **AllowSetActualShipDate**, and **MoveAfterSetShipDates**. The search feature is a good way to find all parameters that have to do with a particular subject.

Search Tip: *Parameter names have no spaces between words. For example, if you were searching on "tracking numbers," type "trackingnumbers" into the* ***Search for:*** *box. You can also select the* ***Show All Parameters*** *check box to browse all of the system parameters. The system displays all of the parameters in the* ***Parameters in Selected Group*** *list.*

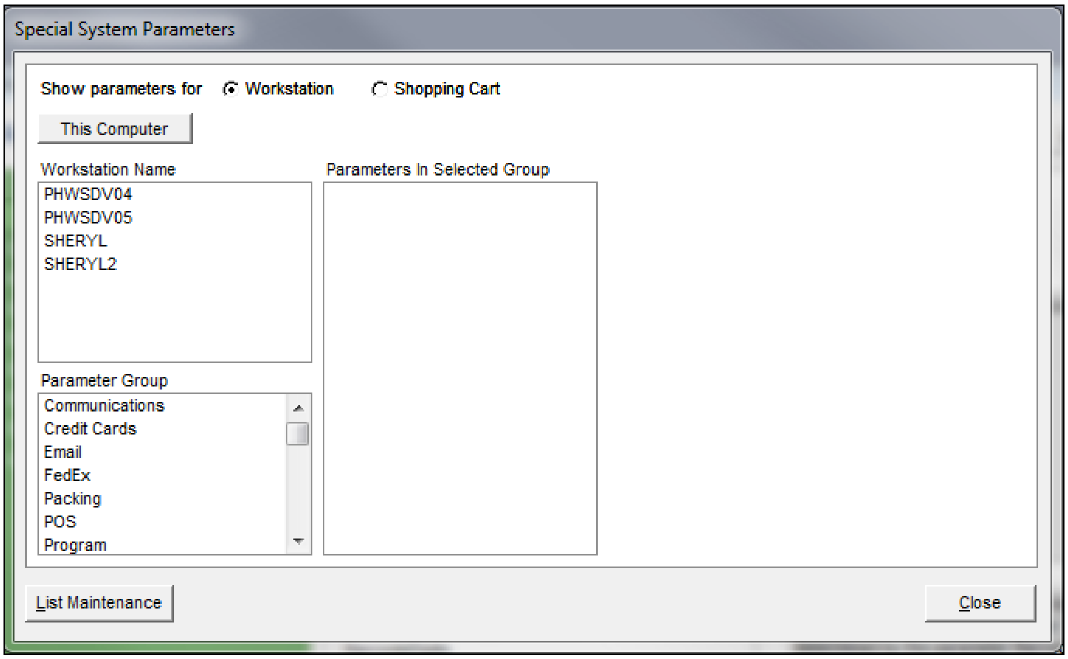
Defining System Parameters

1. Navigate to **Main Menu > Settings > System Functions> Set System Parameters.**
2. Search for a parameter, or select the parameter group and parameter that you wish to set.
3. Edit the parameter:
   a. To change a text parameter, edit the text contained in the **Parameter Text** field.
   b. To change a numeric parameter, enter a numeric value in the **Parameter Value** field.
   c. To change a parameter from a required list of options, select the option from the list.
   d. To change a Boolean parameter, select either **True** or **False**.
4. Click the **Save** button.

Note: *If you do not click the* ***Save*** *button before clicking another parameter or closing the* ***Set System Parameters*** *window, your changes are* ***NOT*** *saved.*

PC & Cart Based Parameters

Most system parameters apply to the selected Stone Edge Order Manager store. However, some system parameters can be set for specific workstations or shopping carts. The **PC & Cart Based Parameters** button in the top right corner of the **Set System Parameters** window opens the **Special System Parameters** window, where you can work with workstation and cart-based parameters.



When processing an order, The Stone Edge Order Manager checks for workstation-based system parameters first. If none are found, it checks for shopping cart-based system parameters that apply to the shopping cart from which the order originated. If no special system parameters are configured, the program uses the default system settings.

Select the **Workstation** option in the **Show parameters for:** section in the top left corner of the dialog box. The workstations in the current Stone Edge Order Manager store are listed in the **Workstation Name** area. The parameters that can be set for individual workstations are listed in the **Parameter Group** area.

Note: *If you use The Stone Edge Order Manager on a Local Area Network (LAN), before you can set any workstation based parameters, you must build a list of the workstations on your LAN. See* ***List Maintenance****, later in this chapter for instructions on creating a list of workstations.*

Select the **Shopping Cart** radio button in the **Show parameters for:** section in the top left corner of the dialog box. The shopping carts available in the current store are listed in the **Shopping Carts** list box. The parameters that can be set for each cart are listed in the **Parameter Group** list box.

Complete the following steps to set a workstation or cart-based parameter:

1. Navigate to **Main Menu > Settings > System Functions > Set System Parameters**.
2. Click the **PC & Cart Based Parameters** button on the Set System Parameters screen. The system displays the **Special System Parameters** window.
3. Select **Workstation**, or **Shopping Cart**.. A list of workstations (previously entered at List Maintenance) or shopping carts appears.
4. Select a workstation or shopping cart from the list. To set a parameter for the current workstation, click the **This Computer** button.

5. Select a **Parameter Group**, and then select a parameter in the **Parameters in Selected Group** list box.
6. The system displays standard fields for entering and setting parameters. Refer to the previous section, ***Defining System Parameters***, for more information about setting these.
7. Edit the parameter as you wish and click **Save**.

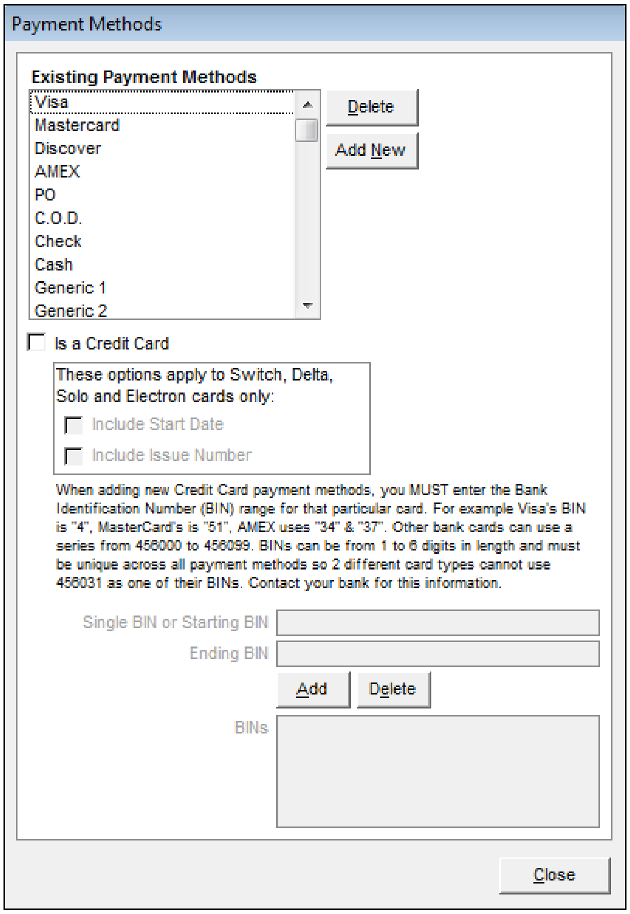
***Note**: You can click the **List Maintenance** button at the bottom of the screen to work with lists. Refer to **List Maintenance**, later in this chapter, for more information on entering lists.*

Payment Methods

The Stone Edge Order Manager comes with a standard set of payment methods:

- Visa
- MasterCard
- Discover
- AMEX (American Express)
- PO (Purchase Order)
- C.O.D. (Cash On Delivery)
- Check
- Cash
- Generic 1
- Generic 2
- eCheck

The **Payment Methods** window lets you create additional payment methods (i.e., PayPal or European credit cards). It is important to have payment methods in The Stone Edge Order Manager that match the payment methods that you use in your shopping carts on the Internet.



If the payment method is a credit card, you must enter the Bank Identification Number (BIN) or range of BINs used by the card issuer. BINs are used to determine the credit card type (e.g., Visa or MasterCard) when the payment is processed through your payment gateway.

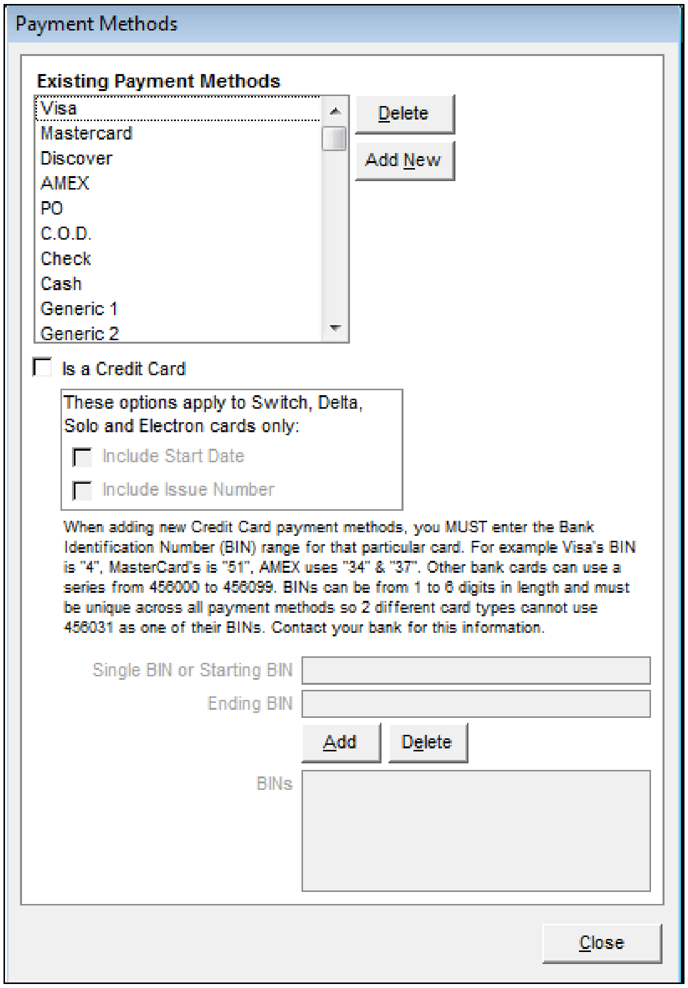
Typically, credit card numbers that start with the number 4 are issued by Visa; however, Switch also uses card numbers that begin with the number 4. Contact the card issuer for an individual BIN or range of BINs. If the card type only uses one BIN, enter it in the **Single BIN** or **Starting BIN** field. If the card uses a range of BINs, such as 456000 to 456099, enter the first number in the range (456000) in the **Single BIN or Starting BIN** field, and enter the last number in the range (456099) in the **Ending BIN** field. The Stone Edge Order Manager automatically generates the range of BINs for this payment method and lists them in the **BINs** list box.

Keep in mind that BINs are used to determine the card type only. BINs are not used to validate the credit card number. That function is performed by your payment gateway.

Creating a New Payment Method

Complete the following steps to create a new payment method for your store:

1. Navigate to **Main Menu > Settings > Data Functions > Payment Methods**.



2. Select **Add New**. Enter a unique name for the Payment Method. The name must exactly match the payment method name used by your shopping cart.
3. Select **OK**.
4. If the payment method is not a credit card, skip to step 5. If the payment method you are entering *is* a credit card:
   a. Check **Is a Credit Card**.
   b. Click the **Include Start Date** and/or **Include Issue Number** check boxes, if necessary. These options only apply to the European credit cards Switch, Delta, Solo, and Electron..
   c. Enter its **Bank ID Number** (BINs) in **Single or Starting BIN**.

   ***Note**: A **Single BIN or Starting BIN** includes up to the first six digits of the credit card account number.*

   d. If the method uses a range of BINs, enter an **Ending BIN**.
   e. Click the **Add** button.
5. Click the **Close** button to exit the **Payment Methods** window.

***Note**: If you enter an incorrect value for the BIN, click the value in the **BINs** list and click the **Delete** button.*

Deleting a Payment Method

Complete the following steps to delete a payment method:

1. Navigate to **Main Menu > Settings > Data Functions > Payment Methods**
2. Select the method that you would like to delete from **Existing Payment Methods**.
3. Click the **Delete** button. The system displays a confirmation dialog.
4. Click the **OK** button twice to confirm the deletion of the payment method.

Email Templates

The Stone Edge Order Manager can send email messages to customers and suppliers. It uses “email templates” to determine the content of the messages. The process is similar to a word processor’s “Mail Merge” function. The Stone Edge Order Manager’s **Email Template Editor** lets you create and edit your own email templates or edit any of The Stone Edge Order Manager’s standard email templates. You can enter text and tags in the template and then preview it using actual data from your store.

Messages can be sent in plain text, in both plain text and HTML, or in HTML only. If you send a message in both plain text and HTML, the recipient sees the message in one format or the other, depending on how the recipient’s email program is configured. We recommend that you send email in both plain text and HTML to increase the chances that your customers will see the text correctly.

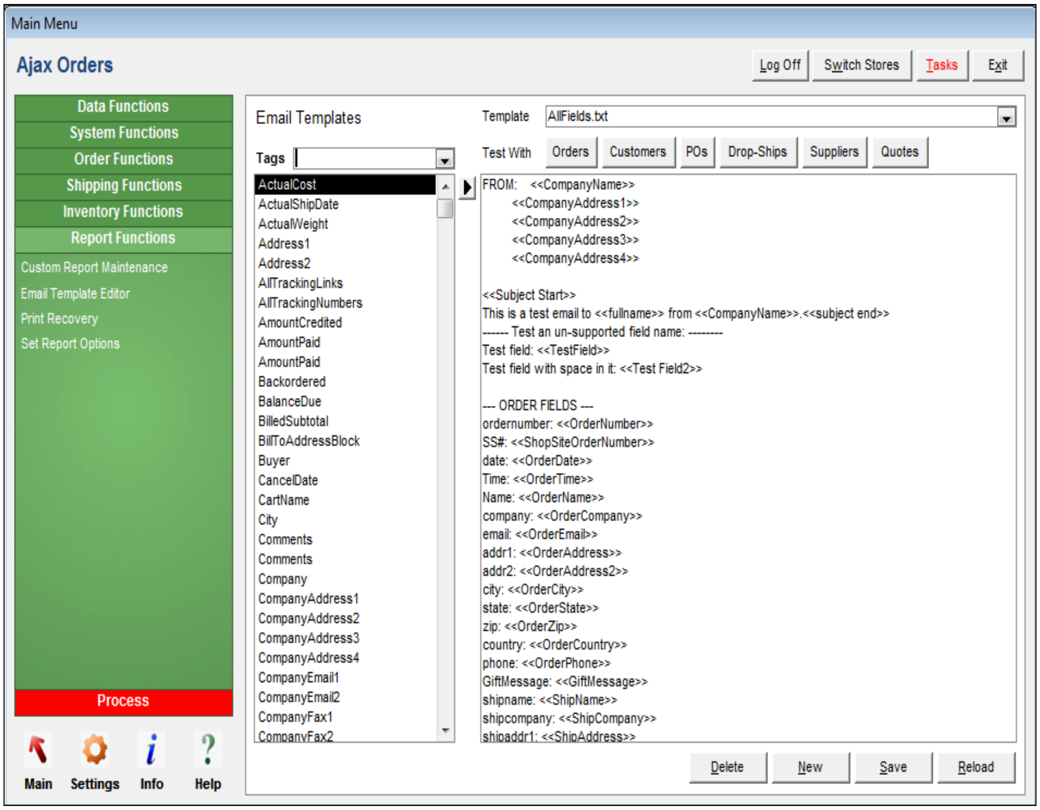
***Note:** The ability to send HTML email messages is only available if you use The Stone Edge Order Manager’s built-in SMTP email system. The **EmailSendMethod** ”system parameter must be set to **Order Manager**. This parameter is automatically set when you choose “Direct via SMTP Server” (i.e., the Stone Edge Order Manager) as your method for sending email on the **Email Tab** of the **Store Setup Wizard**.*

Wherever you can preview and edit email in The Stone Edge Order Manager, you can preview both the plain text and HTML versions of messages (if there is an HTML section in the selected email template), but you can only edit the plain text version.

Editing an Email Template

Complete the following steps to edit an Email Template:

1. Navigate to **Main Menu > Settings > Reporting Functions > Email Template Editor.** The system displays the **Email Templates** window:



2. Select a **Template** to edit from the drop-down list. **Note:** Any text in the editor window between the tag markers, << >>, is a "tag" that is replaced with actual data when the email is sent. You can view email with data inserted by clicking one of the **Test With:** buttons.

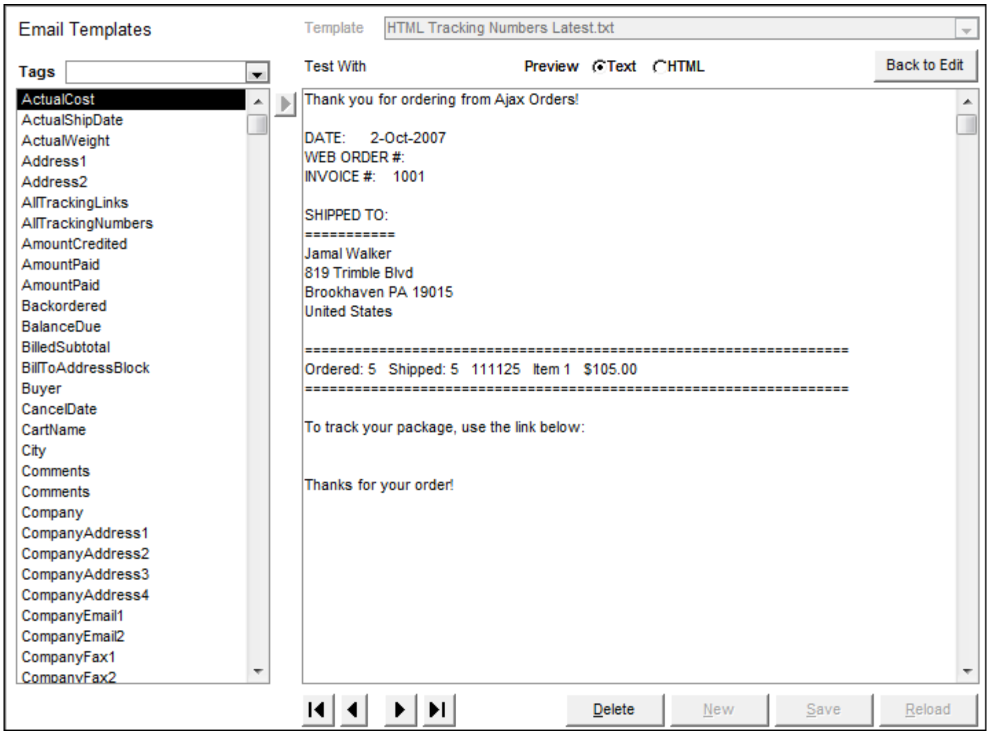
3. Put the cursor anywhere in the editor window to add or edit text.

4. The list of available tags, which represent data fields in your store's database file, is on the left of your screen. To view a specific category of tags, select a group at the top of the **Tags** area.

5. To insert a tag, click in the editor window where you want the tag to appear, then either double-click the name of the tag in the list on the left, or select the arrow button.

6. To preview the email template, click one of the **Test With** buttons at the top of the editor window: **Orders**, **Customers**, **PO's**, **Drop-ships**, **Suppliers**, or **Quotes**. The system displays what the email will look like when it is sent.

Note: *It is important to test a template with the proper type of data. For example, tags related to orders or suppliers will not display correctly if you test the template with Customers.*



Note: *If you select a template with HTML, you have the option of previewing with just* ***Text*** *or with* ***HTML****.*

7. Use the navigation buttons at the top of the editor window to view the template with other available records from your store's database.
8. Click **Back to Edit** to continue working on your template.
9. When you are done with your changes, click **Save**.
10. Click **Close** to exit the **Email Templates** window.

Creating an Email Template

Complete the following steps to create a new email template:

1. Navigate to **Main Menu > Settings > Reporting Functions > Email Template Editor**:
2. Click the **New** button.
3. Enter a name for the new template and click **OK**.
4. You can enter any plain text into the editor window to construct your email.
5. To enter tags:
    a. Select a tag group (**Orders**, **Inventory**, etc.) from the **Tags** area in the left of the window. The specific tags for that category appear in the list.
    b. Select the tag (**ActualCost**, **ActualShipDate**, etc.) that you would like to appear in the new template and click the **Insert into Template** button. The system adds the tag to the new template.
6. Continue adding text and tags until your template is complete, then click the **Save** button.

***Note:** At any point before you save, you can click the **Reload** button to erase current information and reload the last stored version of the template.*

Adding order information or HTML to your email template requires the use of two special tags. Refer to the next section for information on these specialized tags.

Special Email Template Tags

The Email Templates that are used by The Stone Edge Order Manager recognize two special sets of tags to enable higher functionality for the emails that you send to your customers. The **<<Loop Start>>** and **<<Loop End>>** tags allow you to enter line item information for an order without having to know how many line items are in the order.

The **<<HTML Start>>** and **<<HTML End>>** tags allow you to create dual-mode emails. This means that a customer with an HTML-enabled email reader will receive HTML emails, while a customer with a text-only email reader will receive text emails. These dual-mode emails can be sent using a single Email Template. Refer to the ***Knowledge Base*** online for more information on sending HTML emails.

<<Loop Start>> and <<Loop End>> Tags

If you are entering information for a customer's order, you most likely want to include all of the line items in that order. The email template editor recognizes the **<<Loop Start>>** and **<<Loop End>>** tags and repeat all of the tags inside the loop for each line in the order.

For example:

```
=================================================================
<<Loop Start>>Ordered: <<Quantity>>   Shipped: <<QuantityShipped>>   <<LocalSKU>>
<<Product>>   <<Price>>   Ship Date: <<ExpectedShipDate>>

<<Loop End>>
=================================================================
```

The syntax in the template above looks like this in the body of the email below.

```
=================================================================
Ordered: 1   Shipped: 1   bbu001   Full Baseball uniform   $23.99   Ship Date:

Ordered: 1   Shipped: 1   a002   Fleece All Purpose Sweat Pants   $0.00   Ship Date:

Ordered: 1   Shipped: 1   a003   Home Team Jersey   $0.00   Ship Date:

Ordered: 1   Shipped: 1   Atl001   Atlanta Ballcap   $0.00   Ship Date:

=================================================================
```

<<HTML Start>> and <<HTML End>> Tags

The Stone Edge Order Manager supports dual-mode emails within a single email template, you can include a text-only message and an HTML version for customers with either type of email reader. The **<<HTML Start>>** and **<<HTML End>>** tags indicate where the HTML version resides.

***Note:** You can only use the <<HTML Start>> and <<HTML End>> tags once in a template. However, you can use the <<Loop Start>> and <<Loop End>> tags as many times as needed within the same template. For example, you might use one loop to list the names of the items in an order, and a second loop to list their SKUs and prices. Then you might repeat both of those loops within the HTML section of the template.*

The screenshot below is from the **HTML Confirmation with Invoice.txt** template that comes with The Stone Edge Order Manager:

```
<<HTML Start>>
<center><img src="yourcompanylogo.jpg" alt="<<CompanyName>>"></center>
<p>Date: <<OrderDate>></p>

<table width="100%" border="0" cellpadding="0" cellspacing="0">
<tr><td>
<b>Sold to:</b>
<hr align="left" width="75">
<<BillToAddressBlock>>
</tr></td>
<tr><td>
<b>Shipped to:</b>
<hr align="left" width="75">
<<ShipToAddressBlock>>
</tr></td>
</table>


<p><hr align="left" width="70%">
<<Loop Start>>
Ordered: <<Quantity>>  Shipped:  <<QuantityShipped>>  <<LocalSKU>>  <<Product>>   <<Price>>
<br>    <i>Ship Date</i>: <<ExpectedShipDate>><br>
<<Loop End>>
<hr align="left" width="70%">

Product Total: <<ProductTotal>><br>
```

You can enter any standard HTML tags along with The Stone Edge Order Manager email tags to create dynamic emails that are customized to your store. Then, when you click one of the **Test With:** buttons to see what your email looks like, you can select **Text** or **HTML** to view the email in each mode.

List Maintenance

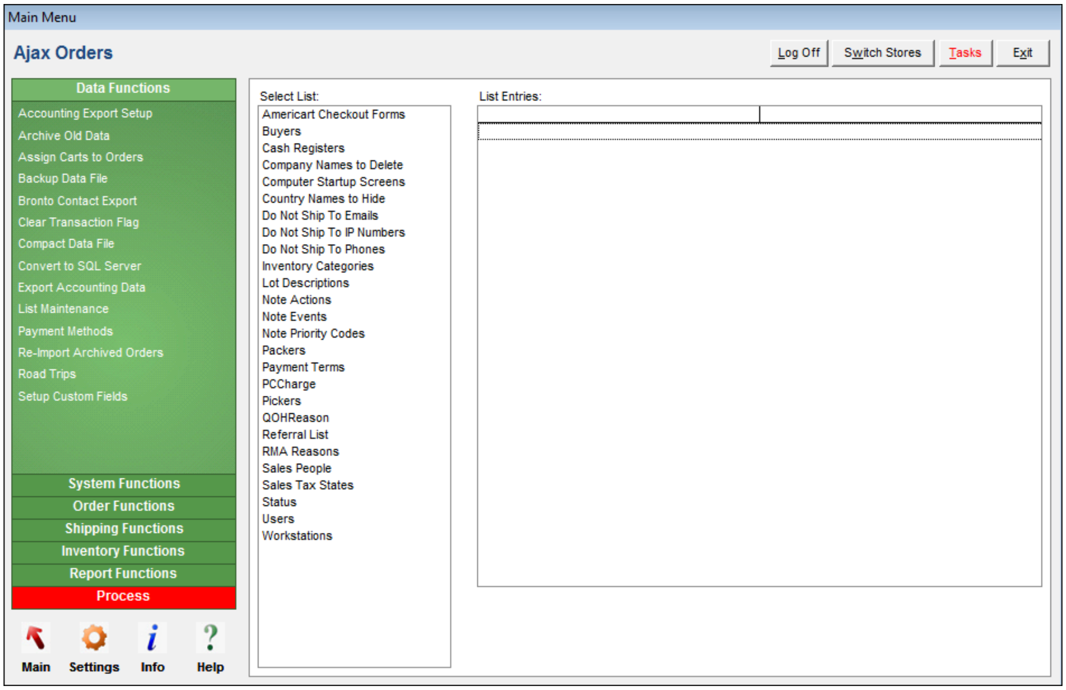
The Stone Edge Order Manager uses a number of “lists” of information, such as a list of packers (employees who pack orders for shipping) or a list of inventory categories. Many of the drop-down lists in The Stone Edge Order Manager are populated by such lists. The **List Maintenance** window allows you to create and edit those lists:

List Name	Function
Americart Checkout Forms	For Americart shopping cart users.
Buyers	Employees who create purchase orders.
Cash Registers	Assigns register and workstation IDs for point of sale (virtual cash register) users.
Company Names to Delete	If you use a shipper that charges different rates for residential and commercial deliveries, you can check imported orders for bad company names, such as Self, Home, N/A or None and the program deletes those company names from your orders.
Computer Startup Screens	Open a specific screen at startup for individual workstations, e.g. Pack & Ship or Manual Orders.
Country Names to Hide	Prevents country name from showing on invoices and packing slips.
Do Not Ship To Emails	Email addresses, IP numbers, and telephone numbers from problem customers that you do not want to ship to.
Do Not Ship To IP Numbers	
Do Not Ship To Phones	
Inventory Categories	Each of your products can be assigned to an inventory category.
Lot Descriptions	Terms to be used for purchasing products in “lots”, e.g. Case or Bundle.
Note Actions	These lists populate drop-down fields for Actions, Events, and Priority Codes at the Notes screen.
Note Events	
Note Priority Codes	
Packers	Employees who packing orders for shipping.
Payment Terms	E.g. “Net 30” or “2% 10 days, Net 30 days”
PCCharge	Workstation and user names for PC Charge users.
Pickers	Employees who pick items from the warehouse for packing.
QOH Reason	Reasons for quantity on hand changes.
Referral List	List of referral sources.
RMA Reason	Reasons for RMAs (Return Merchandise Authorization).
Sales People	Employees who enter orders through The Stone Edge Order Manager.
Sales Tax States	List of states for which sales tax is collected.
Status	Status codes assigned to orders and/or line items.
Workstations	Workstations where The Stone Edge Order Manager is installed.

Editing a List

Complete the following steps to change a list:

1. Navigate to **Main Menu > Settings > Data Functions** > **List Maintenance**. The system displays the **List Maintenance** window:



2. Select the list you would like to edit from **Select List**.
3. Click the field that appears above the **List Entries** column. Some lists have one field to enter; others have two. Enter a list entry and click the **Save** button (not pictured).
4. To delete a list entry, select it and click **Remove** (not pictured).

Setting Computer Startup Screens

The Stone Edge Order Manager allows you to designate individual computers as task-specific workstations. For example, if your warehouse staff handles all of your shipping, you can specify that the PCs in the warehouse can only access the **Pack & Ship** screen.

Workstations can be limited to the following screens:

<u>Main Menu</u> (has access to all normal Stone Edge Order Manager functions)

<u>Point of Sale</u>

<u>Manual Orders</u>

<u>Pack Orders</u>

<u>View Inventory</u>

<u>View Customers</u>

Custom Menu (accesses to the menu defined in the system parameter **CustomMainMenu** in the **Custom** parameter group)

All of the choices in the list above, except **Main Menu** and **Custom Menu**, restrict all users at that workstation to the selected screen.

Note: *It is not necessary to use this feature if all of the computers in The Stone Edge Order Manager networked configuration should have access to all of the screens in The Stone Edge Order Manager. The Stone Edge Order Manager's Security System can also be used to limit access of certain features for selected user groups.*

Complete the following steps to configure computer startup screens for workstations::

1. Navigate to **Main Menu > Settings > Data Functions** > **List Maintenance**.
2. Select **Computer Startup Screens** in the **Select List** box.
3. Enter the Windows computer name for the workstation to be restricted to a specific screen at startup.

   Note: *To enter the name of the current computer, click the* ***This Computer*** *button.*

4. Select the appropriate form for the selected computer from the **Startup Screens** drop-down list.
5. Click the **Save** button. The new entry appears in **List Entries**.
6. When finished, click **Main** or another location in the accordion to leave the **List Maintenance** window.

   Once a startup screen has been assigned to a computer, the next time The Stone Edge Order Manager is launched on that computer, the program goes directly to the designated screen. When that screen is closed, The Stone Edge Order Manager closes.

   Note: *To remove an assigned startup screen from a given workstation, the List Maintenance screen must be accessed from another computer.*

Creating 'Do Not Ship To' Lists

The Stone Edge Order Manager provides a feature to prevent shipping products to problem customers. Select the **Do Not Ship To** check box on the customer record, which tells the program not to automatically approve orders from that customer. However, this only works if the program is able to match a new order to an existing customer record. The **Do Not Ship To** feature enhances the ability of the program to detect orders from problem customers by increasing the amount of data being checked.

The **Do Not Ship To** lists store email addresses, telephone numbers, and/or IP (Internet Protocol) addresses that The Stone Edge Order Manager can compare against the information contained in orders as they are imported. By setting up **Approval Rules**, you can tell the program what to do when it detects an order from someone on the list, such as automatically cancelling the order. Refer to ***Approval Rules***, in Chapter 7, for information on how to set up approval rules.

Complete the following steps to build a **Do Not Ship To** list:

1. Navigate to **Main Menu > Settings > Data Functions** > **List Maintenance**. The system displays the **List Maintenance** window.
2. Select either **Do Not Ship To Emails**, **Do Not Ship to IP Numbers**, or **Do Not Ship to Phones** in **Select List**.
3. Click the **IP #**, **Email Address**, or **Phone Number** text field and enter the first list entry, e.g., 192.68.00.00, george@phonycompany.com, or (999) 999-9999.
4. Click the **Save** button.
5. To delete a list entry, select it in the **List Entries** area and click the **Remove** button.
6. When finished, click **Main** or another location in the accordion to leave the **List Maintenance** window.

Initializing FIFO Data

FIFO cost tracking is used to accurately track the cost of goods sold on a first-in, first-out basis (FIFO). If you use FIFO cost tracking, the program tracks all incoming and outgoing inventory and its cost – meaning that a cost value must be entered for all inventory items. The program prompts the user to enter a cost at the time inventory is received or adjusted if it does not have a cost value on file.

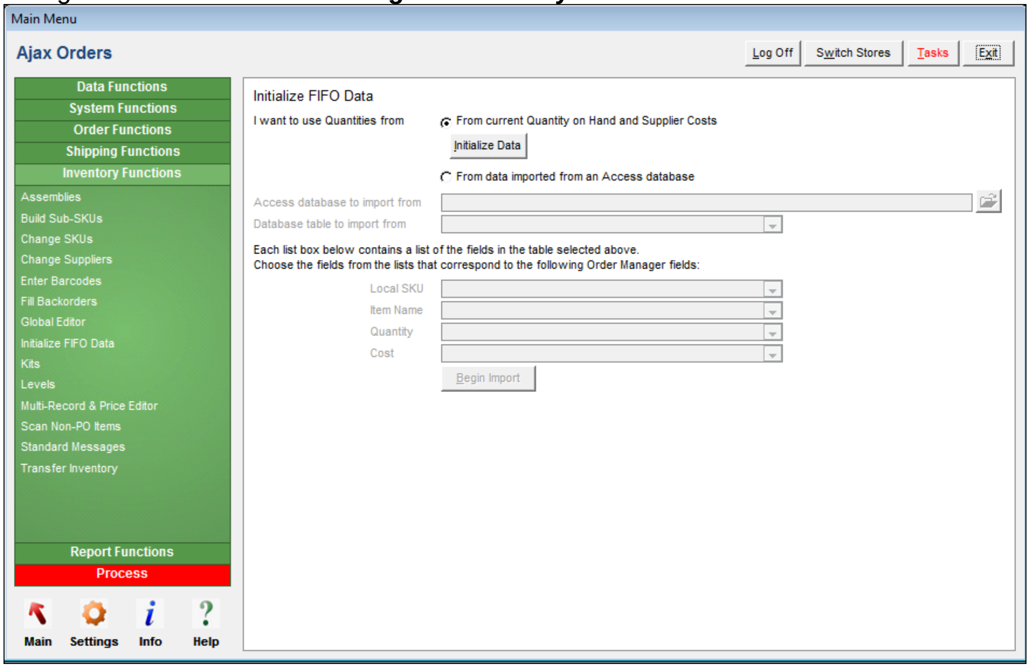
***Note**: To enable FIFO cost tracking in The Stone Edge Order Manager, set the **TrackInventoryFIFO** system parameter (in the **Program** group) to TRUE. Refer to **Setting System Parameters**, earlier in this chapter, for more information on setting Parameters. FIFO settings can also be accessed via the Store Setup Wizard, Accounting section.*

Since costs are normally entered when new inventory is received, when FIFO tracking is first turned on, the starting costs of all inventory items needs to be established. Those costs can be initialized in either of two ways: from existing inventory data, or from an external data source. (FIFO initialization can also be run at any time to re-synchronize the FIFO data with the existing inventory.)

Complete the following steps to initialize FIFO Data:

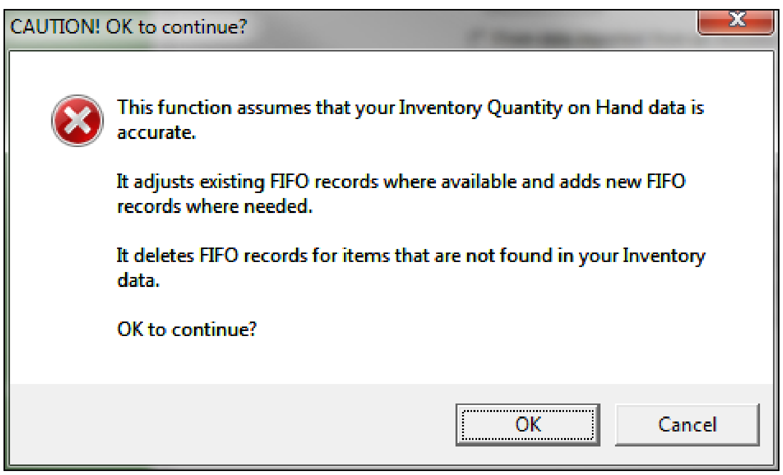
1. Backup the data file prior to implementing FIFO. Refer to the section entitled *Backing up the Database* in Chapter 2 of this manual for more information.

2. Navigate to **Main Menu > Settings > Inventory Functions > Initialize FIFO Data.**



3. Select *one* of the following two options:

   a. Select **From current Quantity on Hand and Supplier Costs** and click **Initialize Data**. Click **OK.**

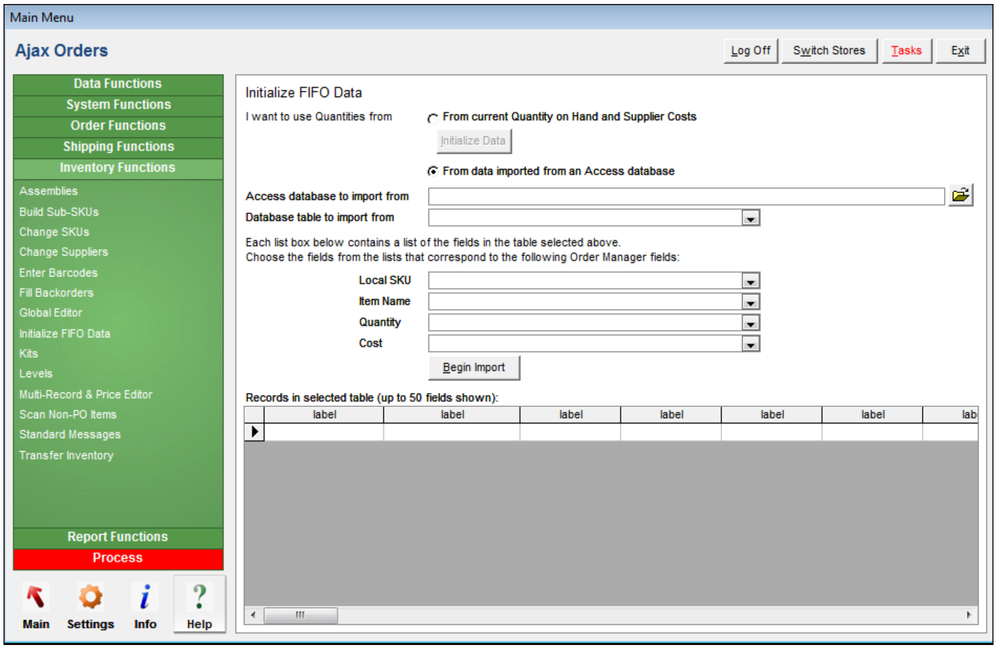


The system prompts for confirmation. Click **OK**:

   b. Select **From Data imported from an Access database** and click **Initialize Data**.

      - Browse to find the desired database and select the table that contains the inventory data you wish to import from the drop-down list. Map the fields in the external table to the corresponding fields in The Stone Edge Order Manager from the drop-down lists.

- Click **Begin Import.**



Backup the data file after confirming that the data was imported correctly.

Accounting Export Setup

The Stone Edge Order Manager can export accounting data directly to QuickBooks, or into a text file that can be imported into some other accounting programs. Individual orders, customers, etc. are not exported. Instead, daily summaries of sales, sales tax, shipping charges, etc. are exported as journal entries, and payment transactions are exported as bank deposits.

Before sales and deposit data can be exported from The Stone Edge Order Manager, complete the following steps:

- Tell The Stone Edge Order Manager which accounting interface to use.
- Create a default accounts receivable account and a sales tax account in QuickBooks.
- Import your Chart of Accounts into The Stone Edge Order Manager.
- Set up the necessary accounts and options in The Stone Edge Order Manager.

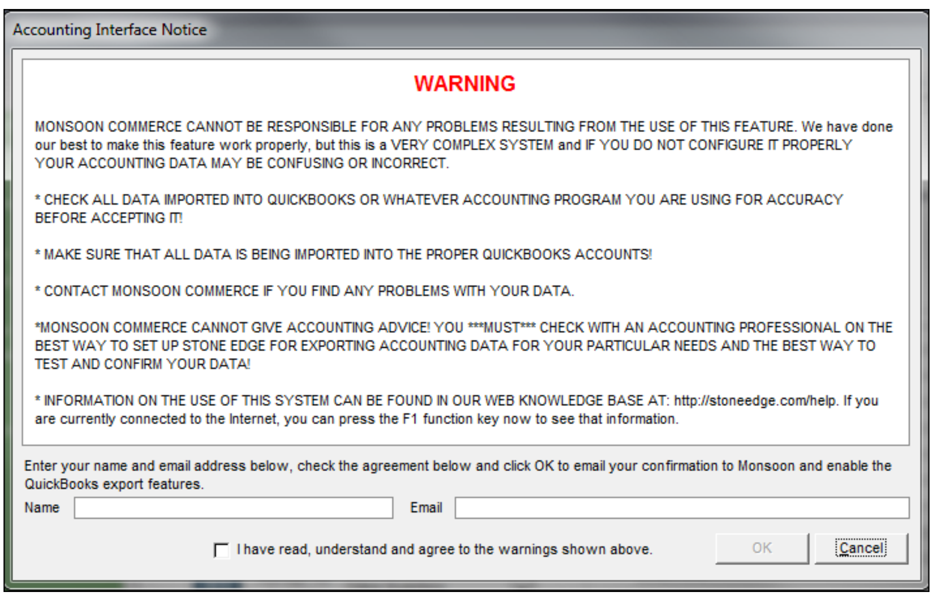
It is necessary to have a good working knowledge of accounting practices and procedures to work with this component of The Stone Edge Order Manager. Stone Edge Technologies does not provide accounting advice; please seek assistance from an accounting professional.

Note: *The instructions for the accounting export setup included here are very general. For more detailed instructions, refer to the online* ***Knowledge Base****.*

Complete the following steps to configure The Stone Edge Order Manager for your accounting program:

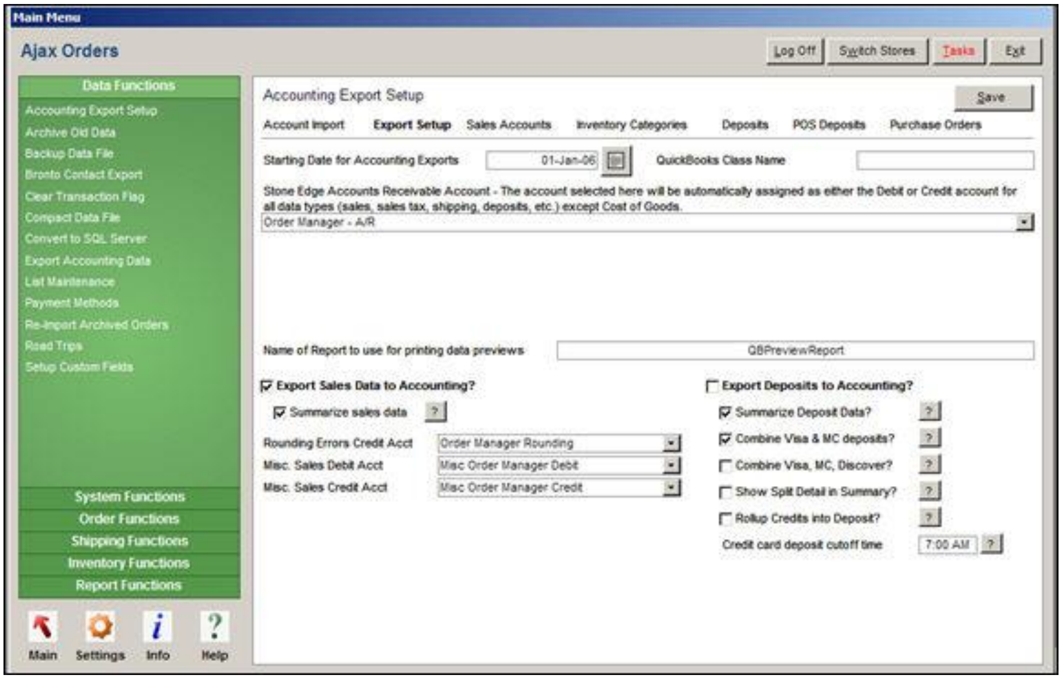
1. Navigate to **Main Menu > Settings > System Functions > Set System Parameters.**
2. Select the **Program** parameter group.
3. Select the parameter **AccountingApplication**.
4. Select your accounting application method and click **Save**:
   - **None** – No accounting export is used.
   - **QuickBooks File Transfer (.iif)** – Accounting data is exported to a user-designated .iif file (special QuickBooks compatible text files). This option is no longer recommended because the Direct Transfer method is better and easier to use.
   - **QuickBooks Direct Transfer (xml)** – Accounting data is exported directly into your QuickBooks data file. This is the recommend method for use with QuickBooks.
   - **Simple Text** – Accounting data is exported to a user-designated, tab-delimited .txt file.
5. If accounting software will be used, create the accounts that The Stone Edge Order Manager will use in that application.
6. Prepare your chart of accounts for importing into The Stone Edge Order Manager.
   a. If using the **QuickBooks File Transfer** method, export your Chart of Accounts from QuickBooks to an .iif file.
   b. If using the **QuickBooks Direct Transfer** method, determine the location of the QuickBooks data file as it will need to be entered in The Stone Edge Order Manager.
   c. If using the **Simple Text** method, export your Chart of Accounts from your accounting application into a tab-delimited text file.
7. In The Stone Edge Order Manager, go to **Main Menu >Settings > Data Functions > Accounting Export Setup**.

   If this is the first time you have gone to this screen, the system will display a warning screen alerting you of the importance of having an accountant or expert administrator configure these options.

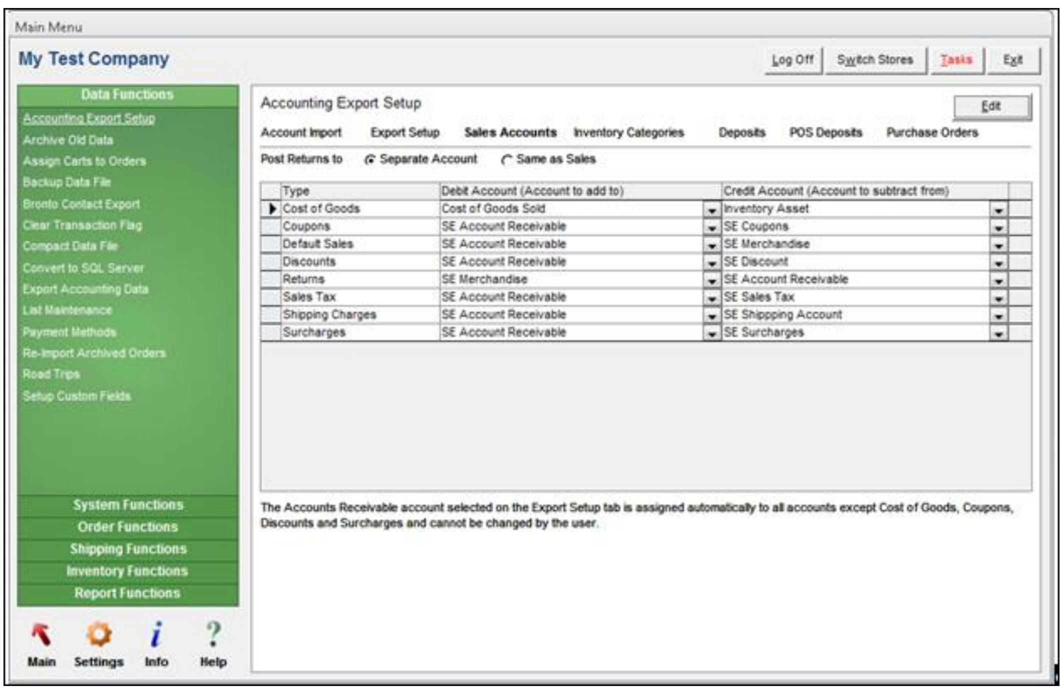


   After typing in your name and email address, and click the button to confirm that you've read, understood, and agree to the warning and the **Accounting Export Setup** screen appears:

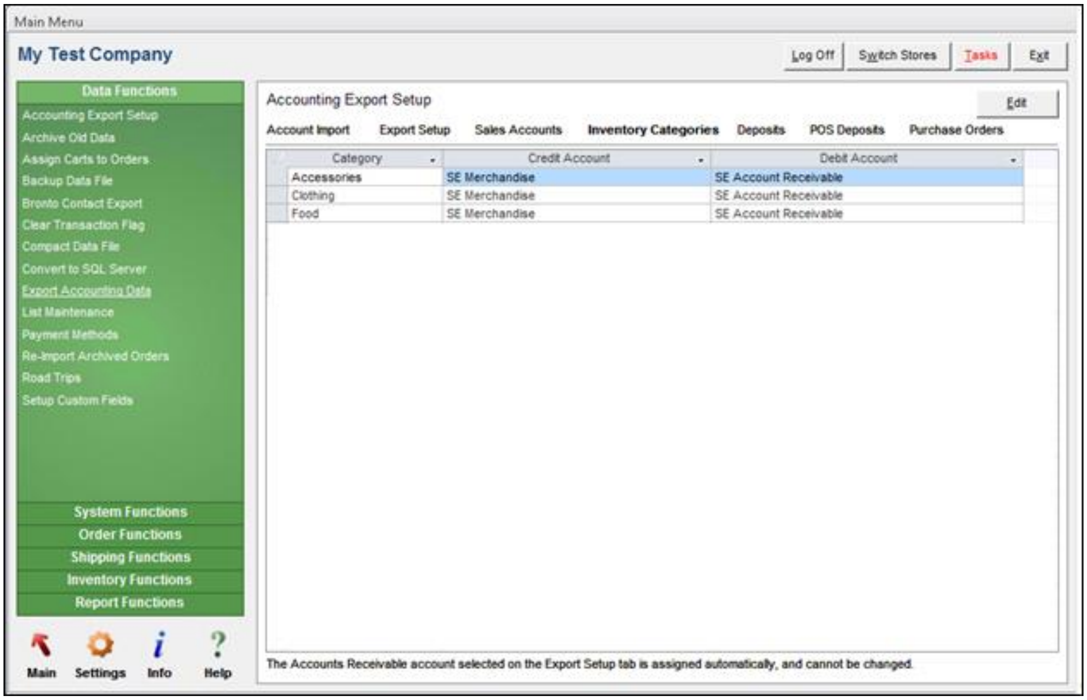
8. **Browse** to the location of the QuickBooks Company File and click the **Import Chart of Accounts** button.



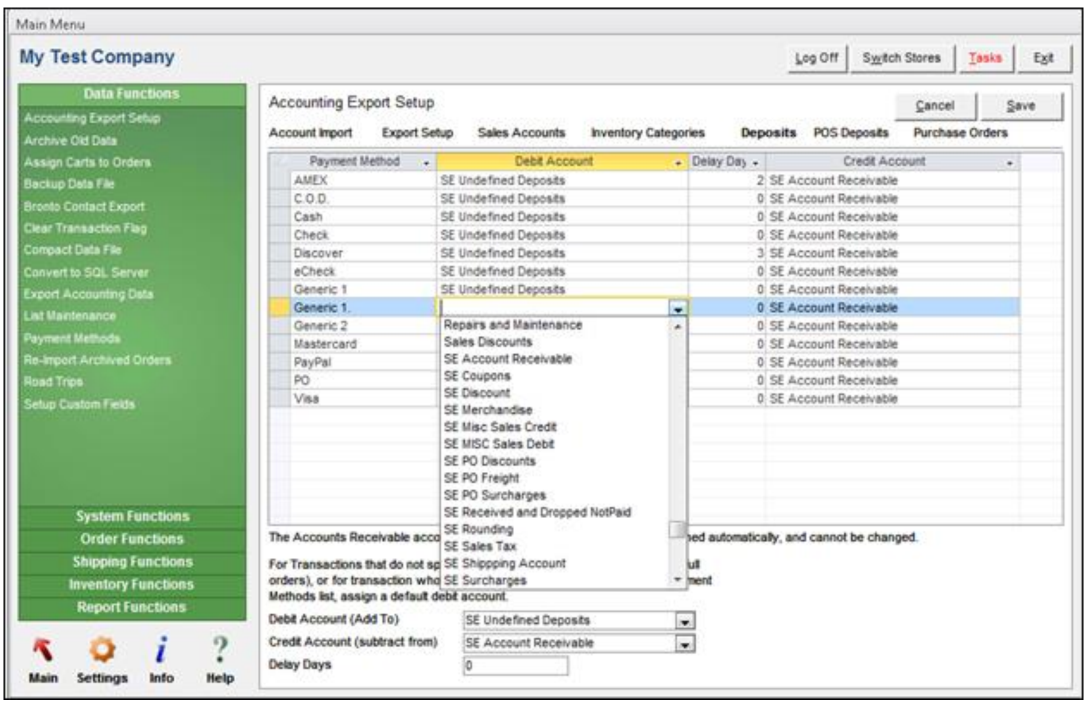
9. On the **Export Setup** tab, fill in the required information and select the export options that you want the program to use.



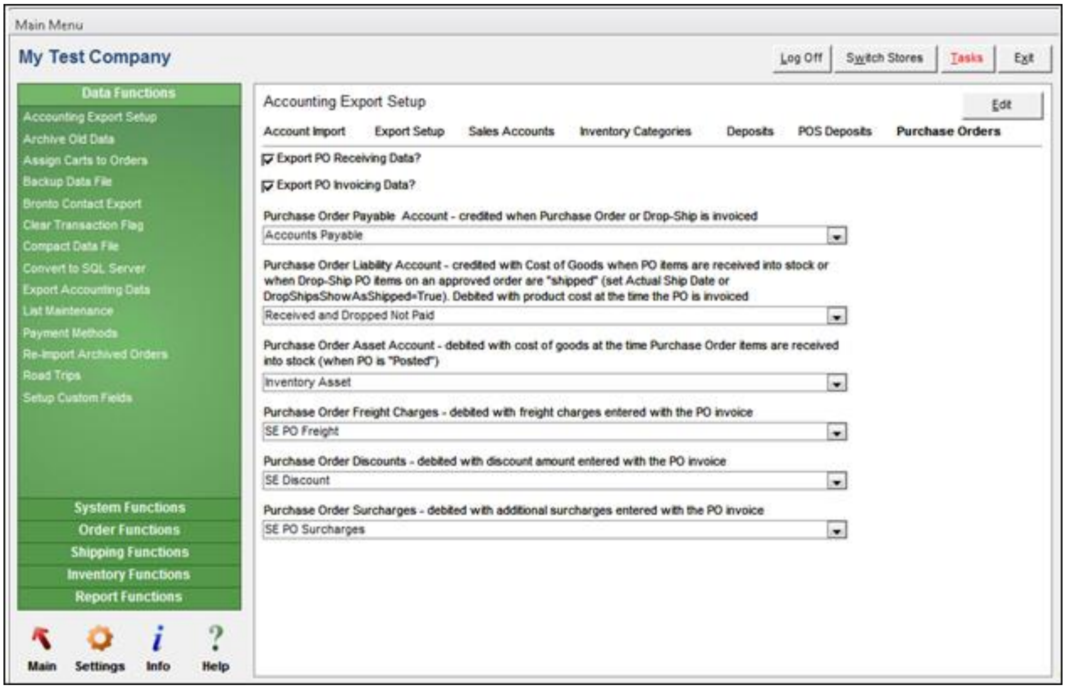
10. On the **Sales Accounts** tab, pick the QuickBooks accounts you want to use for each type of data to be exported. Note that for most accounts, one side (debit or credit) is automatically assigned to your default Accounts Receivable account. Notes and instructions appear at the bottom of the screen as you click on different data types.



11. On the **Inventory Categories** tab, select The Stone Edge Order Manager inventory categories and assign them to specific credit accounts defined in QuickBooks.



12. On the **Deposits** and **POS (Point of Sale) Deposits** tabs, determine which transactions to export to QuickBooks based on their payment methods, and in which QuickBooks accounts they are recorded.



13. On the **Purchase Orders** tab, select the options to use when exporting purchase order data to QuickBooks.
14. Backup the data file when satisfied with the setting choices. Refer to the section entitled *Backing up the Database* in Chapter 2 of this manual for more information.

    Note: *The instructions for the accounting export setup included here are very general. For more detailed instructions, refer to the Accounting section of the online* ***Knowledge Base***.

Managing Multiple Stores

If a merchant maintains more than one ecommerce site, The Stone Edge Order Manager can manage orders from all of them in a single store file (data file) or as separate store files for each site. If the sites share inventory, it is best to maintain them in a single store file. The program tracks the source of each order by shopping cart and can be configured to retain the branding of the web sites through the use of cart-specific parameters.

Note: *The Stone Edge Order Manager is licensed for use with one or more types of shopping carts. A license for a single type of shopping cart comes with the purchase of the program. To use a different shopping cart system, you must purchase an additional cart license from Stone Edge Technologies. Some cart types, such as Yahoo!, may require an additional (nominal) fee to setup a second store of the same cart type because they require space on the Stone Edge Technologies servers.*

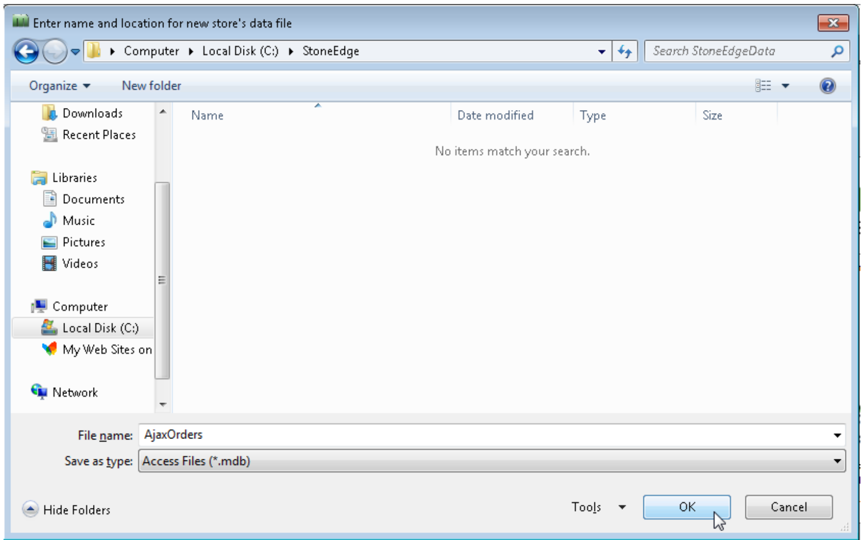
Creating a New Store

Each Stone Edge Order Manager data file is called a “store”. You can import orders from one or more sources into a single Stone Edge Order Manager store If you sell the same general product line through multiple channels, it is best to manage them all in the same Stone Edge

Order Manager store. Orders for businesses that are different legal entities should be kept separately in their own Stone Edge Order Manager store files.

Complete the following steps to create a new Stone Edge Order Manager store:

1. Navigate to **Main Menu > Settings > System Functions > Create New Store**. The system prompts you to select a location to save the new store's database file:



2. Select the folder where the data file will reside and enter the **File name.**

Tip: *Stone Edge Technologies suggests including all or part of your company's name plus the word "Orders" when naming a store file, for example: GreatStuffOrders. Do not use ".com", quotes (") or apostrophes (') in the file name.*

Note: *For single workstation installations, place the data file in the c:/StoneEdge folder. For multi-user installations, place the data file in a shared folder on the local area network. See the* ***Quick Start Guide*** *for more information.*

3. Click **OK**.

4. Enter your company name and click **OK**. A message box appears, stating that the store file has been opened.

Note*: The name entered here appears on screens and reports. It can be changed at any time via the* ***Store Setup Wizard****. If multiple shopping channels (carts) are contained in a single data file, use Special System Parameters to properly "brand" order information in reports. See section* ***PC, & Cart Based Parameters****, later in this chapter, for more information.*

5. An informational message box states the Setup Guide appears next.

6. Click the **OK** button. Refer to the *Quick Start Guide* for more information about the Setup Guide.

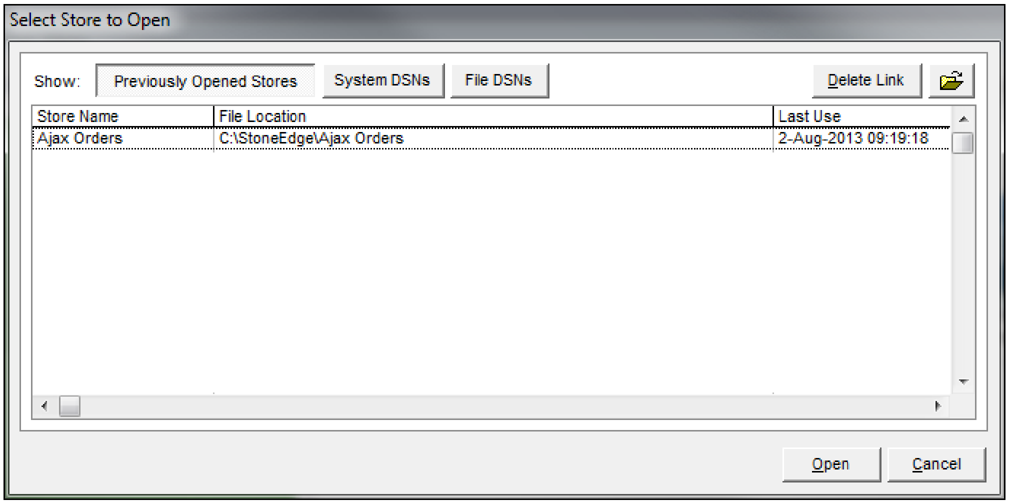
7. Backup the newly created data file. Refer to the section entitled *Backing up the Database* in Chapter 2 of this manual for more information.

Switching Stores

Any number of "stores files" can be created. If multiple stores are created you can switch between them without exiting The Stone Edge Order Manager.

Complete the following steps to switch stores:

1. Click the **Switch Stores** button on the Main Menu. The system displays the **Select Store to Open** window.



2. Double-click the appropriate store from the list or select it and click the **Open** button. If the desired store file is not listed, click the **Folder** icon to locate the file. The Stone Edge Order Manager displays a confirmation message when the new store file is opened.

Note: *The Switch Stores icon is only visible on the main menu if system parameter* ***AllowSwitchStores*** *is set to TRUE. Refer to* ***Setting System Parameters*** *for more information.*

3. The system displays Main Menu of the selected store.

Maintaining Your Database

This section of the manual discusses maintenance procedures for the Stone Edge Order Manager data file. The backup and restore functions mentioned here refer to the built-in backup and compact functions (buttons or links on the Main Menu) of The Stone Edge Order Manager that apply specifically to Microsoft Access databases. SQL users should also schedule regular backups using the appropriate management suite software. If another third-party utility is used to create backups of the data file, refer to that utility's documentation for data backup and restoration instructions. It is also a good business practice for both SQL and MS Access database users to maintain an off-site backup copy of the data file for disaster recovery purposes.

As data is added to a database ("store" or "data file") through the daily process of importing and managing orders, customers, etc., the data file gradually grows larger. While size is not normally an issue with SQL databases, Microsoft Access databases need to be compacted on a regular basis to keep the program running efficiently.

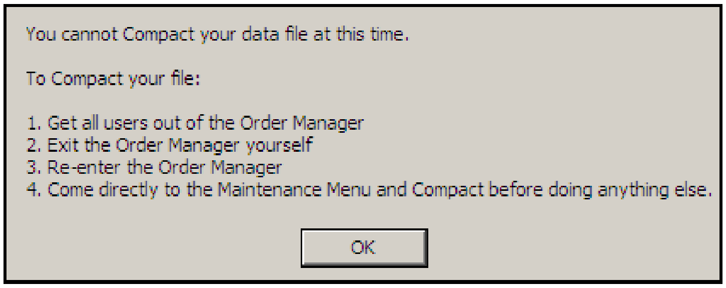
It may also become necessary to archive older order information so that the data file does not reach the 2GB size limit for an Access database. If the data file reaches or exceeds that limit, the program is not able to open. It is possible to view archived orders that and to re-import them into the production data file, if necessary.

Compacting the Database

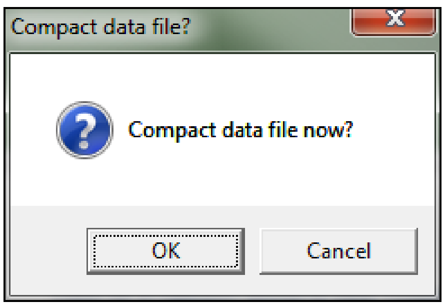
As you add information to a Microsoft Access database, the file gradually grows in size to accommodate new information. However, Access does not automatically shrink the file as information is deleted. The **Compact Data File** function recovers unused bytes left over from deleted information and also rebuilds all of the indexes in the database. This function results in the database running much more efficiently.

Complete the following steps to **Compact Your Access Data File**:

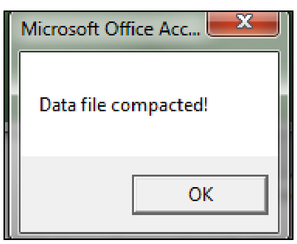
1. Confirm that all users are logged out of The Stone Edge Order Manager. If they are not, the following message displays:



2. Backup the data file by clicking the **Backup Data File** link on the **Quick Clicks** section of the Main Menu. See the next section entitled, *Backing Up the Database,* for more details.
3. Click the **Compact Data File** button on the **Quick Clicks** on the Main Menu. The Stone Edge Order Manager asks for confirmation before proceeding:



4. Click **OK**. The Stone Edge Order Manager displays a confirmation screen:



***Note:** The process can take anywhere from a few seconds to several minutes, depending on the size of the data file. Clicking the **Compact Data File** link also causes the program to compact the OMTemp database.*

Backing up the Database

The information contained in your data file is unique to your store. This file contains all of the customer, order, and supplier records, and the system settings that were entered in **System Parameters**. If a store data file is lost or corrupted, ,a backup copy needs to be restored so you can continue processing orders with minimal disruption.

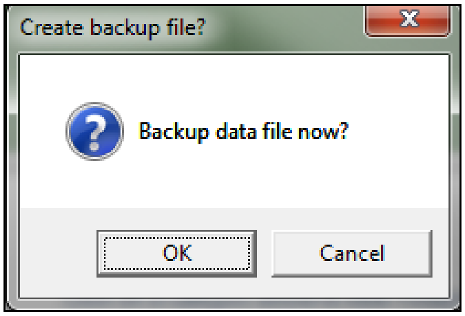
The **Backup** function creates a copy of the current (open) store's data file in the archive directory. The file is named **OrderManagerDataBUyyyymmdd.mdb**, where “yyyymmdd” is the date the backup is performed. If a file with that name already exists (i.e., a backup was performed earlier that same day), the program adds a hyphen and appends a number to the name, e.g.

OrderManagerDataBU20050214-1.mdb. Old backup copies of the data file should be deleted periodically from the archive directory to avoid wasting large amounts of disk space.

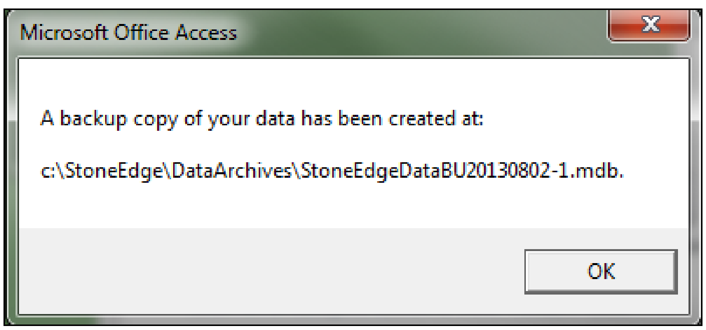
Note: *Stone Edge Technologies strongly recommends backing up the data file daily. We can replace a program file (e.g. SEOrdman2007.mdb) but we cannot replace or fix your store data file if it is corrupted!*

Complete the following steps to back up a Microsoft Access data file:

1. Confirm that all users are logged out of The Stone Edge Order Manager.
2. Click **Backup Data File** from Quick Clicks on the Main Menu or go to **Main Menu > Settings > Data Functions > Backup Data File** . A confirmation window appears:



3. Click **OK**. The system displays a confirmation message indicating the location where the backup data file is stored. To change this location, go **to Main Menu > Settings > System Functions > Set System Parameters** and update the value in the **ArchiveLocation** parameter. (Orders Parameter Group).



Restoring the Database

Complete the following steps to **Restore a Backup Copy** of a Microsoft Access Data File:

1. Determine the location of the archive directory and the current data file being used by pressing **Ctrl+Shift+C** simultaneously at the Main Menu.
2. Close all instances of The Stone Edge Order Manager.
3. Navigate to the location of the production data file.
4. Rename the current copy of the Stone Edge Order Manager data file (i.e., the old copy that you want to replace) by single-clicking on the file, right-clicking and choosing **Rename**. Type the new file name in the text box and then press **Enter** to complete the name change. For example, if the store data file is called MyOrders.mdb, rename it MyOrdersOldData.mdb.
5. Go to the archive directory and select (single-click) the file to be restored. Right-click and choose **Copy** to place the file on the clipboard.

Note: *Do **NOT** "cut" or delete the copy of the backup data file in the archive directory. It may be needed again.*

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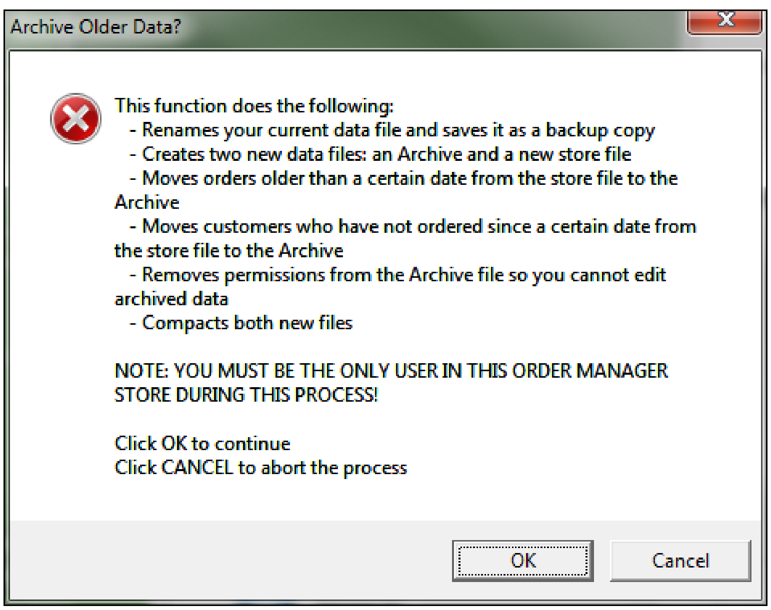
6. Return to the folder where the production data file resides (refer to step1). Single-click anywhere in the folder, right-click and then choose **Paste** to add the backup file to the folder.
7. Rename the copy of the backup data file to your original store data file name (i.e., MyOrders.mdb) Refer to instructions for renaming files in step 4.
8. Restart The Stone Edge Order Manager.

Archiving Old Data

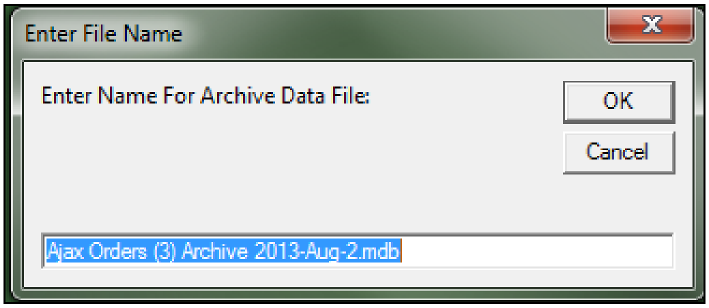
As the data file grows, it may be possible to improve the performance of The Stone Edge Order Manager by removing old data from the active store file. The **Archive Old Data** function moves orders that were placed prior to a specific date into a separate data file (created in **c:\StoneEdge** or another default directory). Records for those customers who have not placed an order since a specific date can also be moved. (The dates specified for Order and Customer records can be different.) The archive file is viewed by clicking **Switch Stores** on the main menu and selecting the appropriate file, just like switching to any other data file, but most functionality is disabled in an Archive data file to prevent the historical data from being changed. For information about improving the performance of The Stone Edge Order Manager and archiving data, see the article, *Archive Old Data* in the online Knowledge Base.

Complete the following steps to archive your old data:

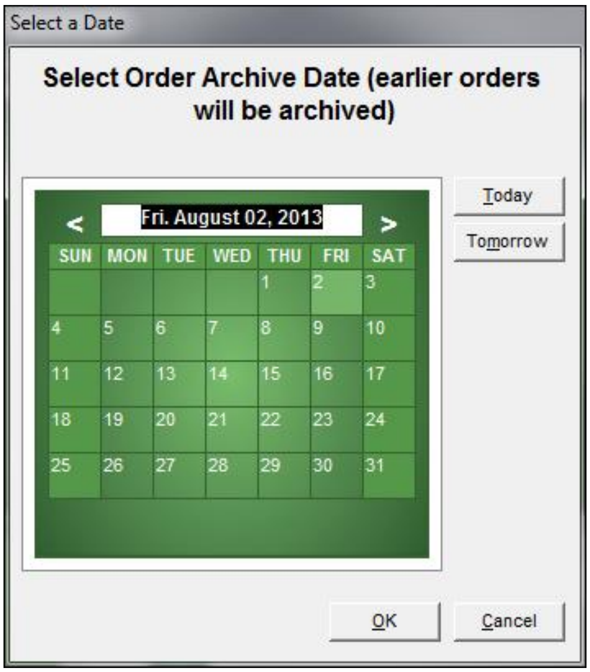
1. Ensure that all users are logged out of The Stone Edge Order Manager.
2. Backup the data file. See the section entitled, *Backing Up the Database*, for details.
3. Navigate to **Main Menu > Settings > Data Functions > Archive Old Data.**
4. The **Archive some of your older data now?** dialog box opens. Click **OK**.



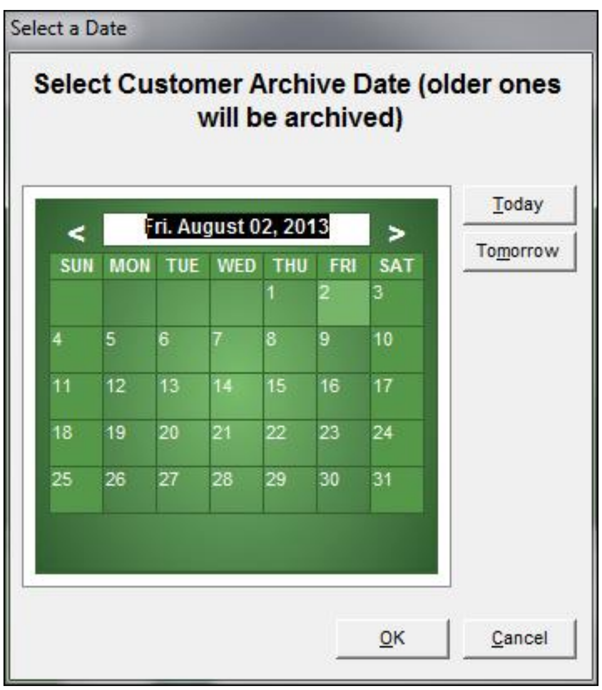
5. Enter a name for the archive file. The default name is **YourStore'sDataFileName Archive YYYY-MMM-DD.mdb**. Click **OK**.



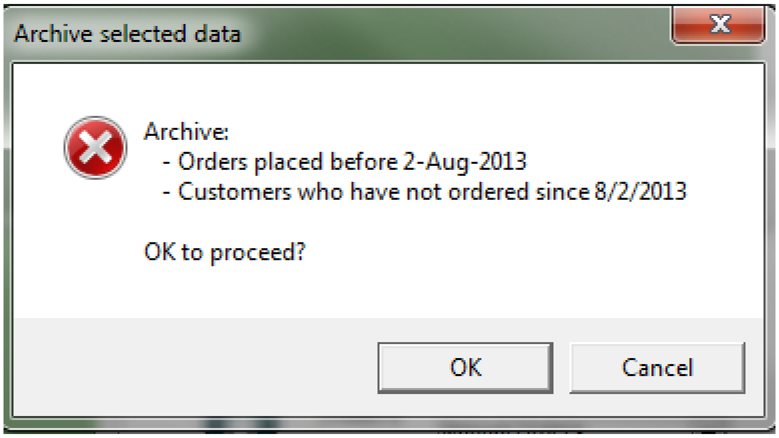
6. Use the calendar to specify a cut-off date for orders:



7. Use the calendar to specify a cut-off date for customers:



8. The **Archive selected data** dialog box opens. Click **OK**.



9. The results are displayed in a message box:

***Note**: You may be prompted for your Stone Edge Order Manager **User ID** and **Password**.*

Re-Importing Archived Orders

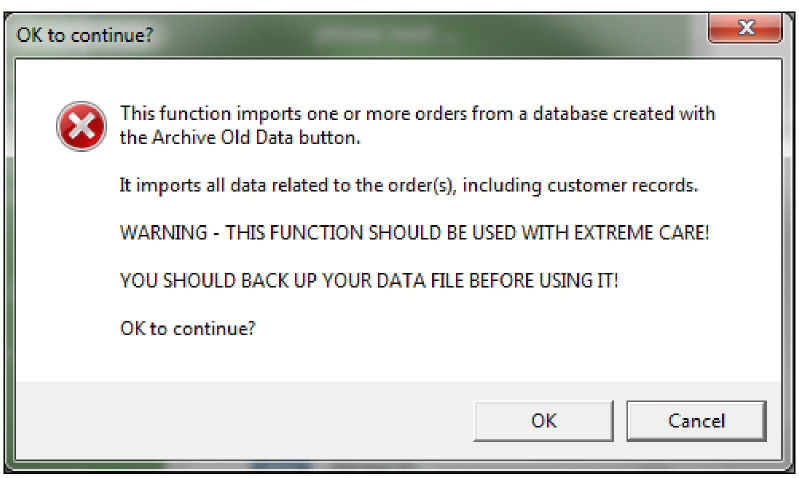
If it becomes necessary to re-import data which has been archived, use the **Re-Import Archived Orders** function found at **Main Menu > Settings > Data Functions > Re-Import Archived Orders**.

When retrieving archived orders, this function re-imports any related order details (line items), transactions, returns & RMAs, drop-ship orders, notes, and customer records.

Depending on the amount of data that is re-imported, this process can take a long time to finish, therefore it is recommended that you run this function during off-hours, or overnight.

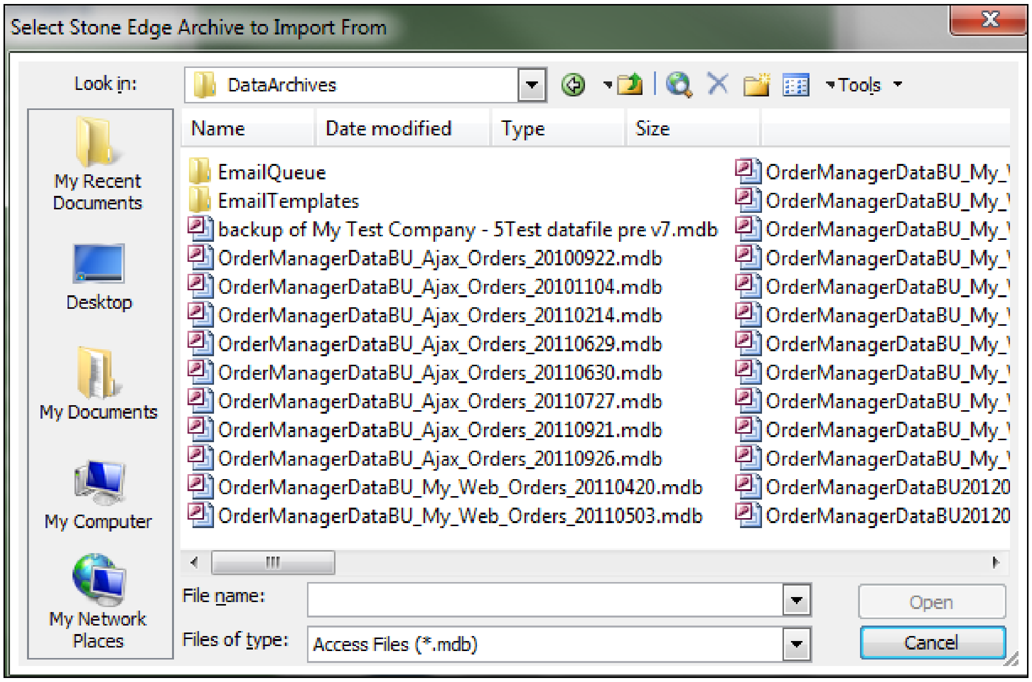
Complete the following steps to **Re-Import Archived Orders**:

1. Backup the current data file. See the earlier section of this chapter entitled, *Backing Up the Database*, for details.
2. Navigate to **Main Menu > Settings > Data Functions > Re-Import Archived Orders**. The Stone Edge Order Manager displays a warning message:

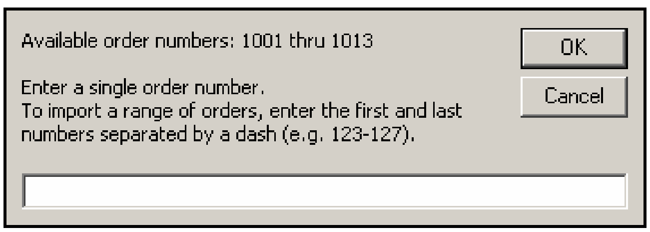


3. Click **OK**.

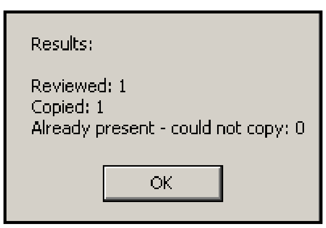
4. Browse and select the archive data file from which the archived order(s) are to be re-imported.



5. Click **Open**. The **Available order numbers** window appears:



6. Select the **order number** or the **range of order numbers** and click **OK**.
7. When the process is completed, the results are displayed:



8. Backup the production data file after verifying the results. Refer to the previous section of this chapter entitled, *Backing Up the Database*, for more details.

Custom Report Maintenance

The Stone Edge Order Manager provides many reports,including accounting reports, inventory and sales reports, invoices, labels, packing slips, pick lists, purchase orders, quotes and custom reports.You can also create your own reports.

Many common requests for custom changes to our standard reports have been parameterized and can be implemented by setting System Parameters rather than by editing the standard reports provided with the program. For example, a company logo can be added to reports by entering the path to the image in system parameter **ReportLogoLocation** rather than making a copy of a standard report and replacing the Stone Edge logo with the merchant's logo**.** If, however, if you require changes not covered by the setting of parameters and custom reports *are* created by you, Stone Edge Technologies, or a third party, they must be exported from the program file in which they were created and exported to (saved in) the **Custom Reports** database so that they are not lost when the program is upgraded. The same process should be followed for custom forms, queries or modules. All of these objects reside in the program file component of the Stone Edge Order Manager application and are therefore overwritten when a new version of the program is installed.

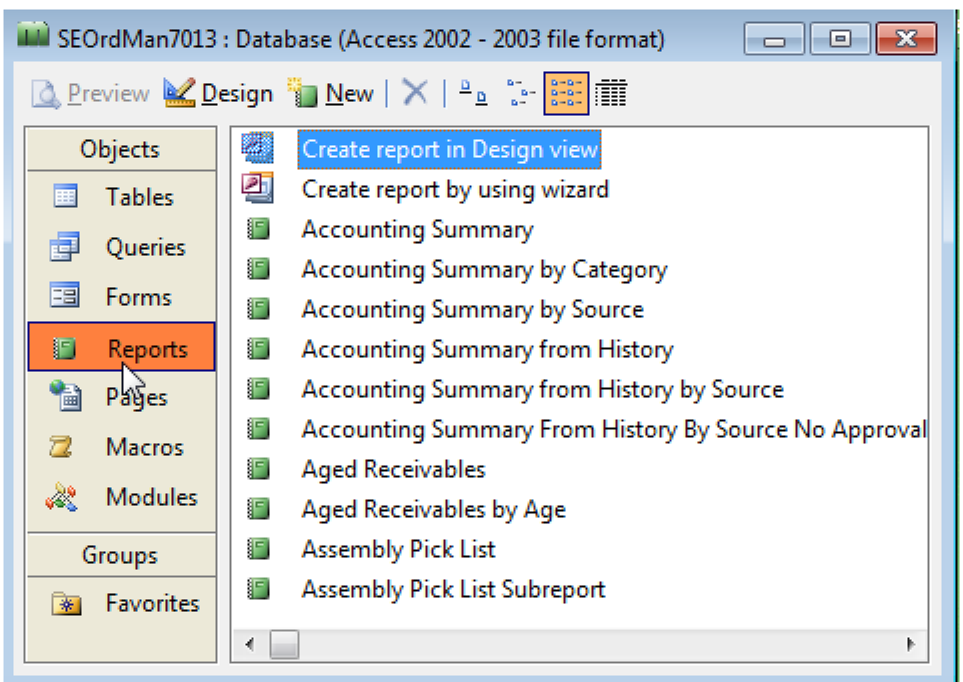
The **Custom Report Maintenance** screen is the interface where you can easily transfer custom objects between the Custom Reports database and the Stone Edge Order Manager program file. It is accessed from the **Quick Clicks** on the Main Menu or by going to **Main Menu > Run My Reports > Run My Management Reports**. The custom reports database is named "Custom Reports.mdb", and is located in the same Windows directory as the Stone Edge Order Manager data file.

Stone Edge Technologies delivers custom reports via email with the zipped database file attached. Save the attached zip file and note where it is located. Using Windows Explorer, navigate to the zip file and double-click it to extract the database file. Note where the file is extracted and then follow the directions below.

Creating and Editing Reports

IMPORTANT: *These steps require knowledge of Microsoft Access report generation, which is beyond the scope of this manual. There are many books available that provide instructions for generating MS Access reports.*

At the Main Menu, press the F11 function key, which opens the Microsoft Access Database Window. Select **Reports** from the Objects menu on the left to view all of the reports currently available in The Stone Edge Order Manager. Note that many of the reports include the word "subreport" in their names. Those reports are used within other reports; they are generally not run by themselves.



Select a report by single-clicking it, then right-click and choose **Print Preview** to see what the report looks like. To make changes to a report, select it, right-click and choose **Save As** to make a copy of the standard report with a new name. It is a good practice to include the company initials as part of the report name to help distinguish it from the standard reports. Once the copy has been made, select the report, right-click and choose **Design View** to access the report designer. Make the desired changes to that report, and when finished, export that modified report to the Custom Reports database for safe-keeping. Do *no*t delete fields from the report unless you also remove all references to that field. A better practice is to set the field's Visible property to No. Refer to Microsoft's help for more assistance.

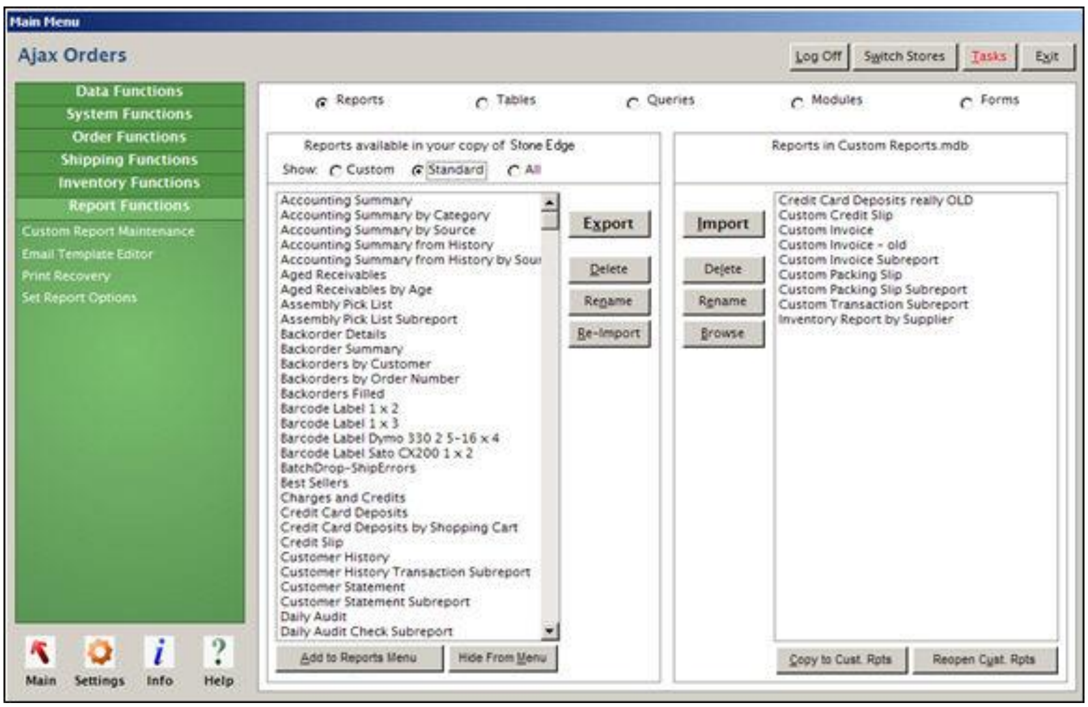
As you may have noticed, The Stone Edge Order Manager offers alternate forms of the same report type. In order for the program to know which report form to use, you must choose the format that meets your needs and enter it into the system parameter for that report type. For instance, InvoiceTemplate designates which Invoice report (sales receipt) to use. If the merchant has a custom invoice report created, he must also update the value in the InvoiceTemplate parameter to point to that custom report in addition to importing the report itself into the program file.

Custom Report Maintenance Tips

The Custom Report Maintenance screen makes it easy to import and export custom reports, rename reports, etc.

Click the Custom Report Maintenance button on the Quick Clicks list on the Main Menu or go to **Main Menu > Settings > Reporting Functions > Custom Report Maintenance**.

The location of the Custom Report.mdb is determined by the system parameter **SharedFileLocation**..



Select **Custom** or **Standard** to filter the list of reports available in The Stone Edge Order Manager. To view all the reports in your store's database file, click **All**.

Click **Delete** above the left-hand column to delete a custom report from the program file of the current workstation.

Click **Delete** above the right-hand column to delete a report from **Custom Reports.mdb**.

Click **Rename** above the left-hand column to rename a custom report in the program file of the current workstation.

Click **Rename** above the right-hand column to rename a report in **Custom Reports.mdb**.

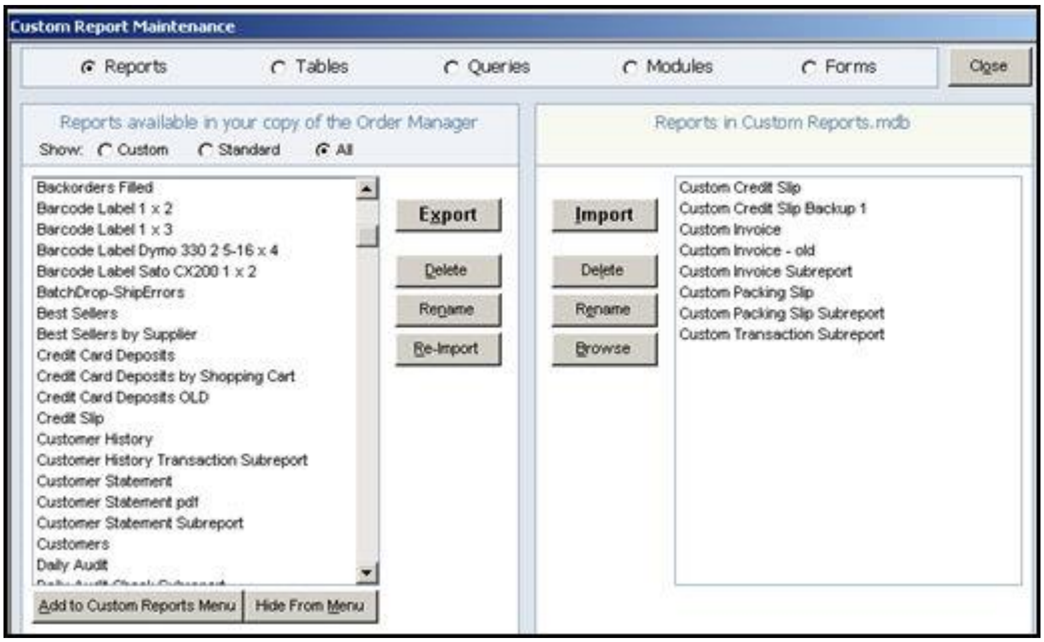
Click **Re-Import** above the left-hand column to re-import a custom report from **Custom Reports.mdb** and overwrite the existing version of the report in the program file of the current workstation. If you have a networked configuration of The Stone Edge Order Manager, the custom report must be re-imported to the program file on each PC in the complex.

Importing a Custom Report

Custom reports can be created by the merchant, Stone Edge Technologies, or a third party. They can be revised versions of standard reports, such as invoices or packing slips, or they can be totally original reports. To use a custom report, it must be imported it into The Stone Edge Order Manager's program file. It should also be saved in the Custom Reports database for safe-keeping.

Complete the following steps to import a custom report from an external source:

1. Click the **Custom Report Maintenance** button from the **Quick Clicks** list on the Main Menu.



Note: *If **Custom Report Maintenance** is not in your Quick Clicks list, navigate to **Main Menu > Settings > Report Functions**.*

2. Click the **Browse** button and navigate to the file containing the custom report and double-click it. The label above the window on the right-hand side of the form changes to reflect the name of the external source file. The reports in the external source database are then shown in the right-hand window.
3. Select the report to be imported into The Stone Edge Order Manager's program file from the right-hand list.
4. Click **Import**. If a report with the same name exists in the current program file, you are asked what action to take:
   a. If **Yes** is selected, the program renames the existing report by appending "Backup 1,2, etc.… ", to the end of the original report name and the new report is imported with the original name; both reports are now be visible in the **Reports Available in The Stone Edge Order Manager** (left-hand list).
   b. If **No** is selected, the existing report is overwritten in the current program file.
5. Click the **Copy to Cust. Reports** button to add a copy of the report to the Custom Reports database, as well.
6. Select (single-click) the newly imported report from the list in the **Reports Available in The Stone Edge Order Manager** section of the form (left-hand side). Click the **Add to Reports**

Menu button (at the top of the **Custom Report Maintenance** form) to add the new custom report to the **Reports Menu**, found at **Main Menu > Run My Reports > Run My Management Reports**.

7. Click **Reopen Cust Rept mdb** button to once again display the reports in the Custom Reports database.

To import an existing custom report from the Custom Reports database into a Stone Edge Order Manager Program file:

1. Click the **Custom Report Maintenance** button from the **Quick Clicks** list on the Main Menu.:

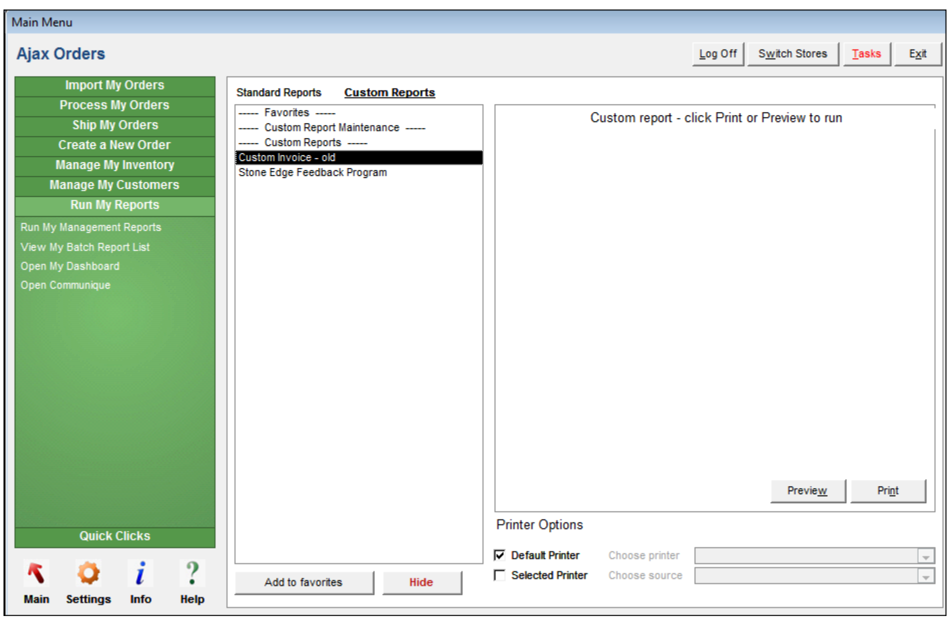
> ***Note:*** *If **Custom Report Maintenance** is not listed in the Quick Clicks list, navigate to **Main Menu > Run My Reports > Run My Management Reports**.*

2. Choose (single-click) the report to be imported from the list under the right-hand portion of the form labeled **Reports in Custom Reports.mdb**

3. Click the **Import** button on the right-hand side of the screen. If a report with the same name already exists in the program file, the program will prompt you for the action to take. Otherwise, the program is immediately imported into the program file and is then visible in the list of reports in the **Reports Available in your copy of Stone Edge** window (left-hand side).

Printing a Custom Report

To print a custom report once it has been imported, go to **Main Menu > Run My Reports > Run My Management Reports**. Click the **Custom Reports** tab, select the custom report from the list and click **Print**. You can also **Preview** reports without printing them.



Exporting a Custom Report

To export a custom report from a Stone Edge Order Manager program file to the Custom Reports.mdb:

1. Click the **Custom Report Maintenance** button from the **Quick Clicks** list on the Main Menu.

> ***Note:*** *If **Custom Report Maintenance** is not in the Quick Clicks list, navigate to **Main Menu > Settings > Report Functions > Custom Report Maintenance***

2. Select (single-click) the report to be exported from the **Reports available in your copy of Stone**

Edge section of the form.

3. Click the **Export** button. If there is already a report with the same name in the custom reports database, the program prompts you for what action to take: **Yes** to rename it, or **No** to replace it. Refer to screenshots elsewhere in this chapter for visual details of the program's responses to either action.
4. If a report of that name was not previously added to the **Report Menu**, click the **Add to Reports Menu** button to add it, otherwise no action is needed.

3 Managing Inventory

The Stone Edge Order Manager is able to import inventory (products) from an existing database or text file, as well as manually entering product information. The program also supports kits and assemblies, permits the generation, scanning and printing of bar codes, provides the ability to manage the purchasing and receiving of inventory products, and much more. The Stone Edge Order Manager's Inventory database can maintain listings of all of the items sold by your store and all the pertinent information needed to sell, pack, and ship the items.

This chapter provides instruction on the following topics:

Viewing Inventory

Entering Product Information

Transferring Inventory

Assemblies and Kits

Standard Messages

Product Levels

Entering Barcodes

Changing Suppliers

Changing SKUs

Building SubSKUs

Receiving Non-Purchase Order Items

Exporting Inventory

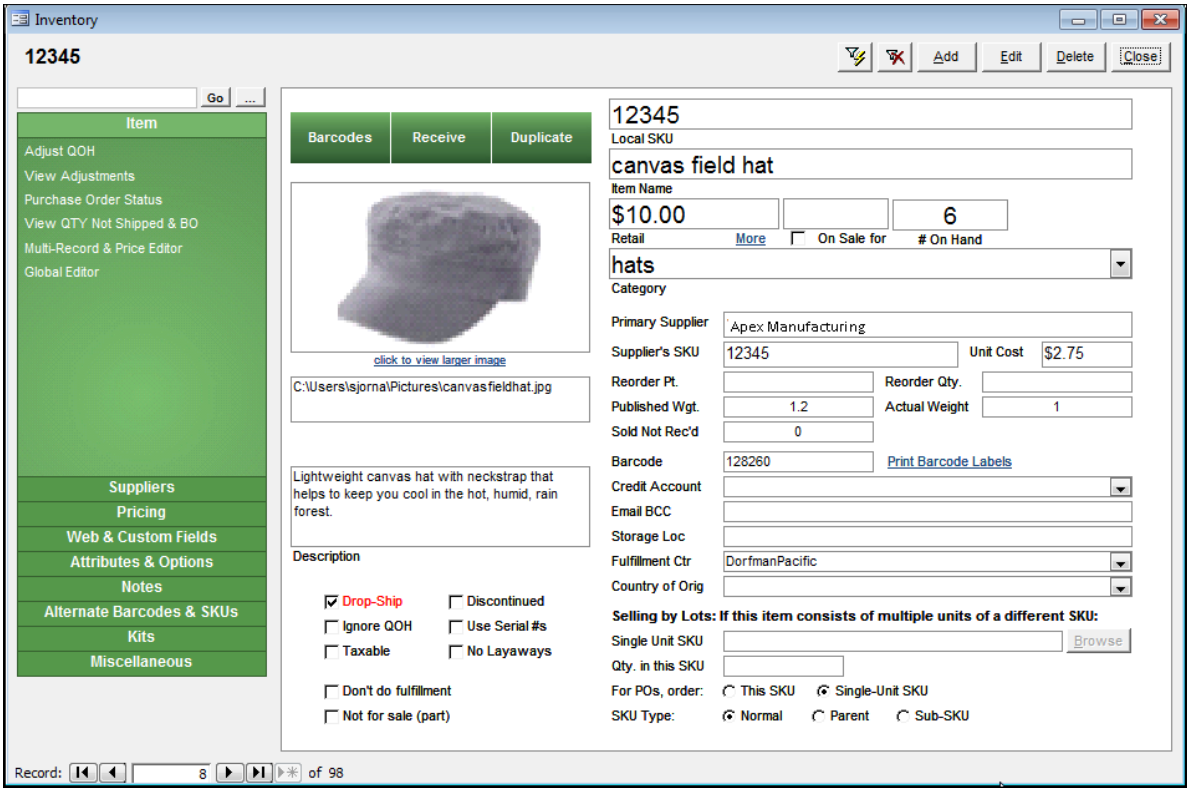
Viewing Inventory

The **Inventory** screen is where you create or edit items and their attributes, manage quantities on hand, assign suppliers, create kits, and much more.

It is opened by the **Manage My Inventory** short-cut button on the Main menu, the **Quick Clicks**, or it can be accessed by navigating to **Main Menu > Manage My Inventory > View and Manage My Inventory**.

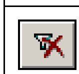
To navigate through the current selection of products, use the navigation arrows at the bottom of the screen.

The accordion menu to the left contains many tabs which organize the various kinds of information associated with an inventory item. Above the accordion lies the **Search** function.



Note: *The terms "product", "item" and "SKU" are used interchangeably in the text below and elsewhere in this manual.*

Action buttons on the main Inventory screen are:

Button	Function
	The **Select Items** button opens the **Select Items** screen, allows you to limit the products in the list by applying a filter. Refer to the next section, ***Selecting an Item to View***, for more information.
	The **Remove Filter** button removes any filter on the item records and allows all records to be seen.
Add	This button allows you to create a new item from a blank template. Refer to ***Creating a New Item***, later in this chapter, for more information.
Edit	Click this button to edit the item record that is being viewed. Refer to ***Deleting or Editing an Item***, later in this chapter, for more information.
Delete	This button deletes the item that is being viewed. Refer to ***Deleting or Editing an Item***, later in this chapter, for more information.
Close	This button closes the **Inventory** screen.

Item Tab

The **Item** tab is the default view when the Inventory screen is opened. It contains the following buttons:

Button	Function
Barcodes	The **Print Bar Code Labels** button prints bar code labels for the selected item. Refer to ***Printing Bar Code Labels***, later in this chapter, for more information.
Receive	This button allows you to receive items into inventory. Refer to ***Receiving Items***, later in this chapter, for more information.
Duplicate	This button creates a new item based on the item being viewed, instead of starting from scratch. Refer to ***Duplicating an Item***, later in this chapter, for more information.

The fields on the **Item** tab are:

Image: Enter the local or web path to the image of the product

Description: Enter a descriptive sentence or short paragraph about the product

Drop Ship: Select this option if the item is shipped directly from the supplier to the customer.

Ignore QOH: Select this option if the item is always in stock, such as a software download, sales brochure, etc.

Taxable: Charge sales tax for this item? This field is only used if the system parameter **UseTaxableField** is set to TRUE; otherwise, the program assumes that all products are taxable.

Don’t Do Fulfillment: Check this box to override the setting of parameter **DefaultFulfillmentCenter** and ship this particular item from in-house inventory, instead of having the fulfillment center ship it. This check box only applies if a default fulfillment center is defined.

Not for Sale (part) : Check this box if the item is part of a kit and should not be sold individually.

Discontinued: Check this field if the product is no longer available. Note that if there is remaining quantity on hand for the item, it can still be sold at the Manual Orders or POS screens until the remaining quantity is exhausted.

Use Serial #s: If checked, when packing items at the Pack & Ship screen, it is possible to scan or enter a serial number which is stored with the Packing data for that order.

No Layaways: Controls whether the POS system accepts layaway orders for this item

Local SKU: The stock-keeping unit of the product which uniquely identifies each product in your inventory. This is an alphanumeric field.

Item Name is a text value describes the product and its attributes, such as CrewNeckTee-Green-Large.

Retail: The retail price of the product.

More: Opens the **Pricing** tab, where additional price level information is managed.

On Sale For: The sale price of the product.

 # On Hand: Current quantity on hand of this item.

Category: Select from a list of inventory categories, defined at the List Maintenance screen, to group your products by type.

Primary Supplier: Select the supplier from whom this item is usually purchased.

Reorder Point: Used for purchase orders. Refer to the Purchase Orders topics in the Knowledge Base for more information about configuring the purchase order system.

Reorder Quantity: Used for purchase orders.

Target Quantity: This value is used for purchase orders. Not shown here. Replaces Reorder Point if system parameter **POCalcMethod** is set to Target Quantity or Delayed Target.

Published Wgt: The weight shown at the web site. This value may be “padded” to allow for the weight of packing materials.

Actual Weight: The weight used for shipping purposes.

Sold Not Rec’d: When using The Stone Edge Order Manager’s purchase order system, there may be times when new inventory is received and some of it is considered to be sold before it is logged as received.

Barcode: For use with barcode scanners. Refer to Knowledge Base article *Enter Barcodes* for more information on assigning unique barcodes to items (other than the supplier’s barcode).

Print Barcode Labels: Opens the Pricing tab where you select the barcode label report template and the number of labels to print for the current product.

Credit Account: For use with QuickBooks. This is only used when you want to export sales data for certain products to different accounts in QuickBooks.

Email BCC: If you enter an email address here, any time an email is sent for an order including this item, a copy of the email is sent to that address.

Storage Location: Where the item is located in your warehouse. The Stone Edge Order Manager only supports a single location per item at this time.

Fulfillment Ctr: Select from a list of Fulfillment Centers established in Stone Edge (**Main Menu > Settings > Shipping Functions > Fulfillment**). This is only used if the item is to be shipped from a separate fulfillment company or warehouse. Search for topics about Fulfillment in the Knowledge Base for more information.

Country of Orig: Used for customs forms; enter a two-letter country abbreviation.

Selling by Lots: If this item is a case lot of another SKU, enter that information in the following fields:

Single Unit SKU: SKU to be used for a single unit of an item which is part of a lot consisting of multiple SKUs. Click **Browse** to search inventory records.

Qty in this SKU: The number of this SKU in the lot**.**

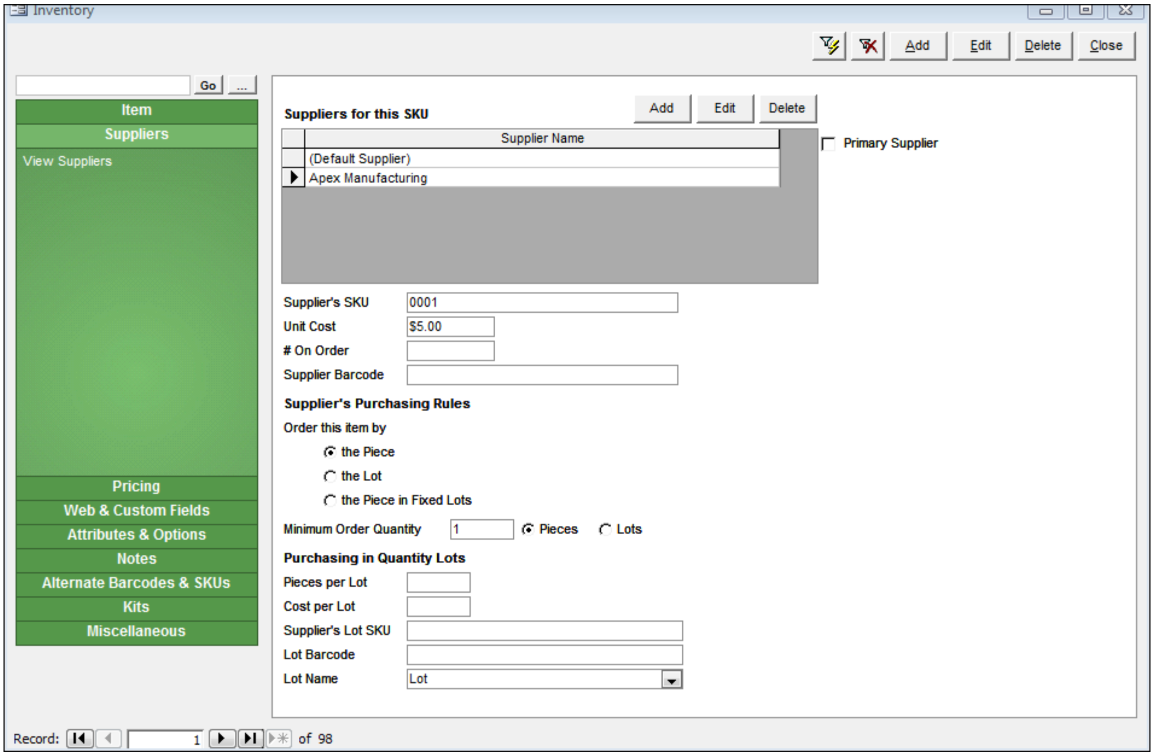
For POs, order: Select the appropriate radio button**, This SKU** or **Single-Unit SKU**

SKU Type: This setting is managed by the program. See the explanation of Parent and Sub-SKUs elsewhere in this manual.

Suppliers Tab

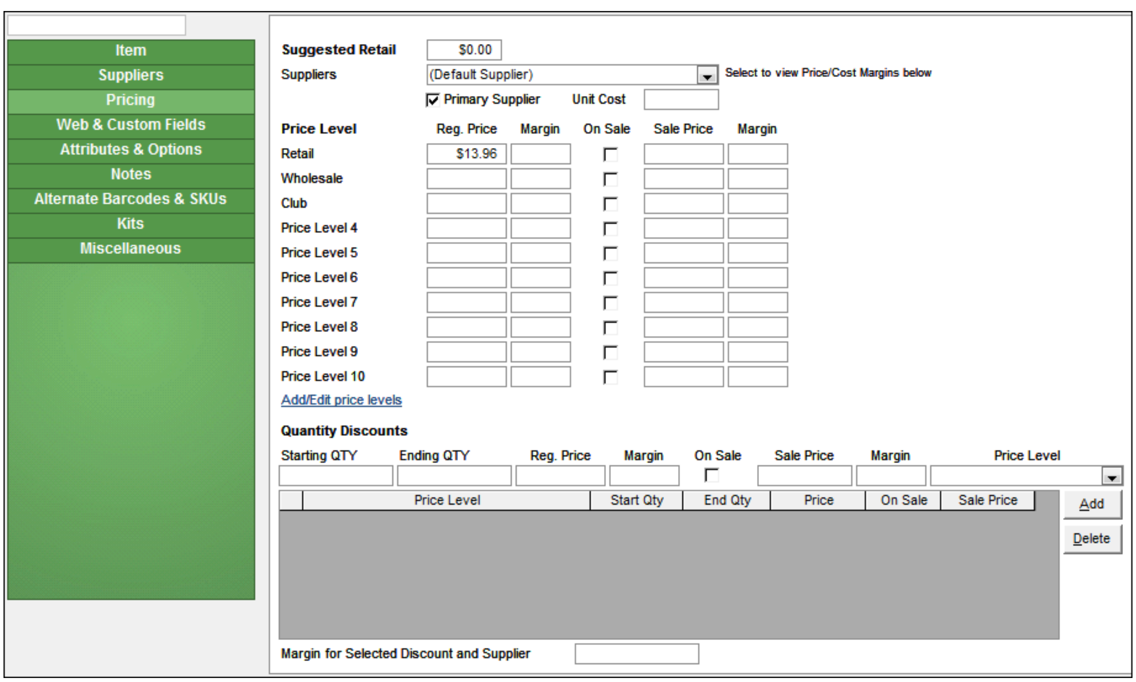
The **Suppliers** tab is where products are associated with suppliers. Products can have more than one supplier, but only one supplier can be designated as the **Primary Supplier**. When the Stone Edge purchase order system is used, the program uses the Primary supplier when auto-generating purchase orders.

Other supplier-related information is also entered and displayed on this tab, such as Unit Cost, Supplier Barcode and purchasing rules (lots or pieces). Refer to the Knowledge Base for specific instructions on using this screen.



Pricing Tab

The Pricing tab is where you view and edit price level information for the selected item. Up to 10 price levels, such as Web, Wholesale, Club Pricing, Employee Pricing, etc., can be established. Price levels are configured through the Store Setup Wizard or via the system parameters in the Pricing parameter group. Refer to ***Setting System Parameters*** for more instructions.



Suppliers: Each product must have at least one supplier. The program provides a Default Supplier record which can be used to help you get started if you have not yet imported your supplier information from a text file.

Primary Supplier: If there are multiple suppliers for the same SKU, one of them must be designated as the “primary” supplier for that item. This box is checked when the supplier currently selected in the drop-down list is designated as the primary. Go to the Supplier tab to add a new supplier to an item or change which supplier is the Primary supplier. When you add a new supplier, the program expects it to become the Primary Supplier. Be sure to deselect that check box if that is not your intention.

Editing Prices

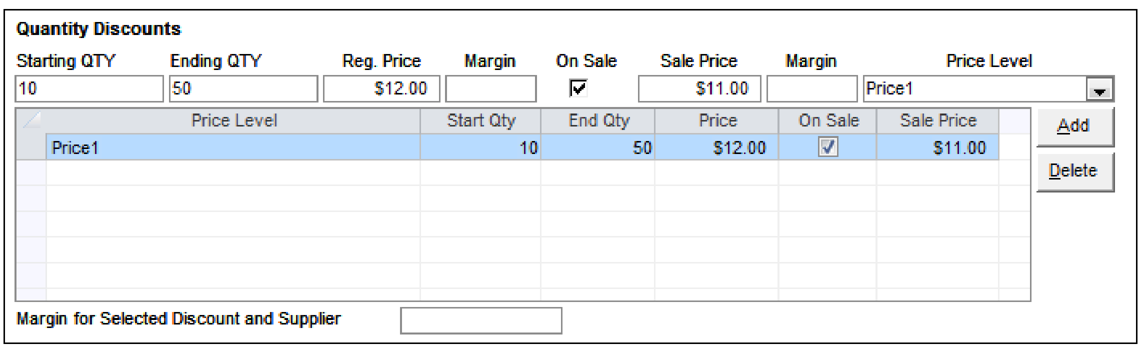
Complete the following steps to edit the prices for an item:

1. Locate the item in the **Inventory** window and select the **Pricing** tab.
2. Click the **Edit** button to unlock the item record and select **More**.
3. Edit the fields or click **Add/Edit price levels** to open the Store Setup Wizard and make changes to the price levels.
4. When finished, click the **Save** button to put the changes into effect.

Note: *The pricing information entered in The Stone Edge Order Manager is only used for manual and POS orders or if a line item is added or changed in an imported order. If the prices at the web site are different from the prices in The Stone Edge Order Manager, the program accepts the web prices as charged on the original Internet order.*

Quantity Discounts

In addition to the ten price levels that can be set for each item in inventory, quantity discounts for each pricing level can also be defined. These quantity ranges also have **On Sale** flags, so it is possible to indicate two different prices for each quantity range and price level: a regular price and a sale price. Quantity discounts are created in the bottom half of the **Pricing** tab:



Complete the following steps to create a quantity discount for an item:

1. Locate the item in the **Inventory** window and select the **Pricing** tab.
2. Enter a **Starting Quantity** and an **Ending Quantity** to define the range to which the new quantity discount applies.
3. Enter regular and sale prices for the quantity range in the **Reg. Price** and **Sale Price** fields. Leave the sale price blank if quantity discounts are not be eligible for Sale Prices.
4. Select whether the item is currently **On Sale**.
5. Select a **Price Level** to which the quantity discount applies.
6. Click the **Add** button.

The system adds the quantity discount rule to the list and automatically applies it to all applicable orders.

Note: *Quantity discounts can only be added and deleted. If you want to edit a discount, you must delete it and create another discount with the desired changes.*

Note: *The pricing information entered in The Stone Edge Order Manager is only used for manual and POS orders or if a line item is added or changed in an imported order. If the prices at the web site are different from the prices in The Stone Edge Order Manager, the program accepts the web prices as charged on the original Internet order.*

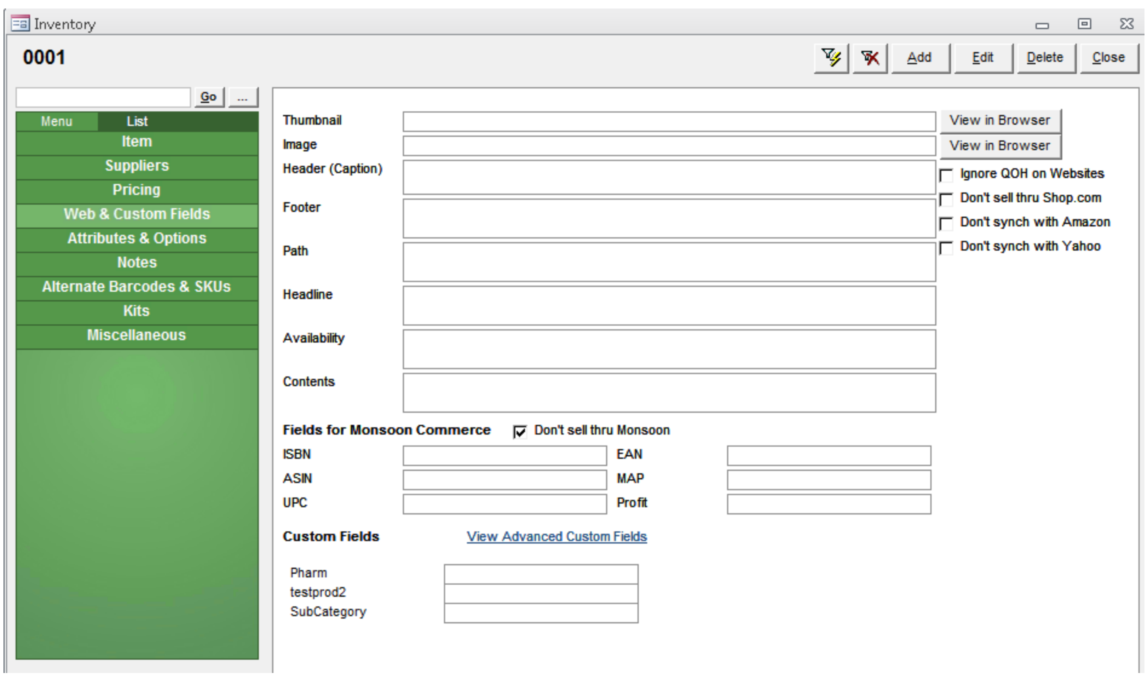
Web & Custom Fields Tab

Note: *Custom Fields only appear if they have already been created. See Knowledge Base topic Configuring Custom Fields.*

Historically, the Web Fields tab contained image data fields that were imported from a Yahoo! Shopping cart, however, the information in the Thumbnail, Image, Header, Footer, Path, Headline, Availability and Contents fields can be used to store image data for other shopping carts as well. For more information on using these fields, see the Knowledge Base article entitled *Displaying Images*.

Over the years, the Web Fields tab has been modified to include settings related to inventory synchronization between The Stone Edge Order Manager and some shopping carts as well. Notice the check-boxes on the right-hand side of the form:

- **Ignore QOH on Websites** – If checked, no QOH values for this item are sent from The Stone Edge Order Manager to *any* shopping cart. This affects both Real-time Inventory Synchronization and Manual Inventory Synchronization (clicking the Send QOH to Website button on the Shopping Cart Functions form).
- **Don't sell thru Altura** – If checked, this product is not be included in the XML file that is created and exported to Altura/Shop.com when the **Export Altura Product List** button on the Shopping Cart Functions page is clicked.
- **Don't Synch with Amazon** – If checked, The Stone Edge Order Manager does not include this item when sending an inventory feed to Amazon.
- **Don't Synch with Yahoo** – If checked, The Stone Edge Order Manager does not include this item when sending inventory synchronization information to Yahoo!

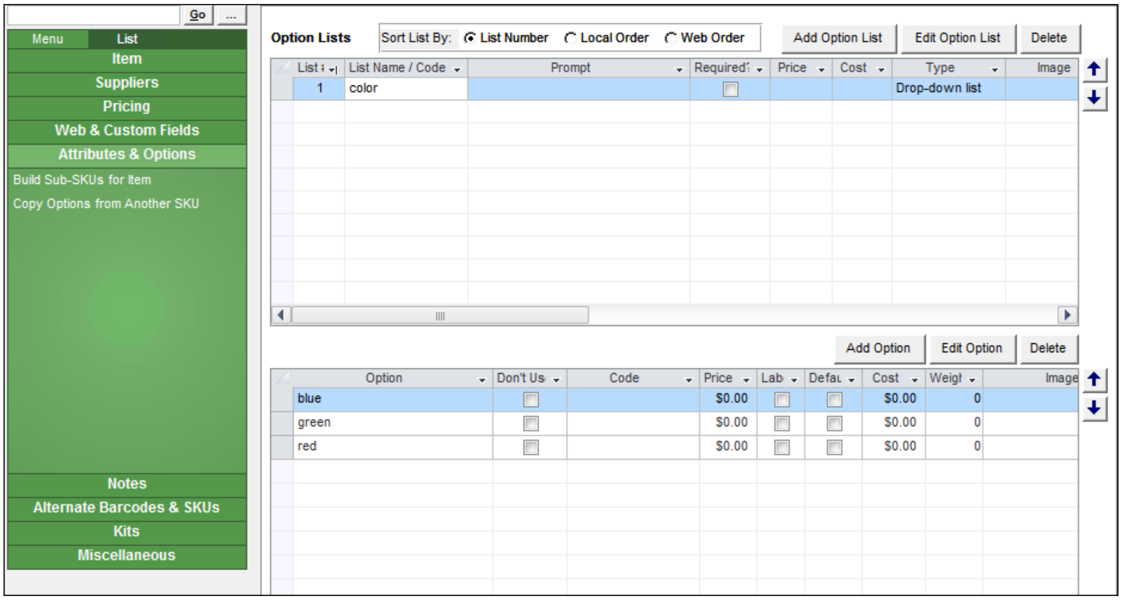


The Inventory custom fields have been added to this tab as well. The Stone Edge Order Manager allows you to add custom fields to the Inventory, Suppliers, Customers, and Orders tables. There can be five fields of each type: text, integer numeric, date and currency.

Review the Knowledge Base topic, *Configuring Custom Fields* for more information.

Attributes & Options Tab

The **Attributes & Options** tab of the **Inventory** window is used to create and edit options for the selected item, allowing you to sell and track inventory by various categories, such as size, color, finish, and model.



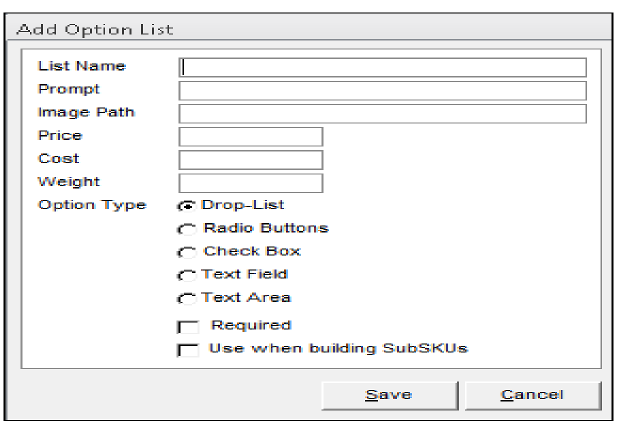
The top half of the window displays **Option Lists** (e.g. Color or Size). The bottom half of the window shows the actual **Options** for the selected **Option List**. Options are created by first defining an **Option List,** and then creating the **Options** to fill the list. Refer to ***Creating and Editing Option Lists*** and ***Creating and Editing Options***, below, for more information.

If there are several items which generally have the same options, it is possible to create option lists and options for one product and then copy them to other items in your inventory. Refer to ***Copying Option Lists***, later in this section, for more information.

Creating and Editing Option Lists

Complete the following steps to create or edit an option list for an item:

1. Locate the item in the **Inventory** window and select the **Attributes/Options** tab.
2. Click the **Add Option List** button, or select the **Option List** to edit, and click the **Edit Option List** button. The system displays the Add Option List configuration window:



Note: *Only the List Name is required here. All other fields are optional. Some, such as Image path and Option Type, are only used in conjunction with specific shopping cart systems.*

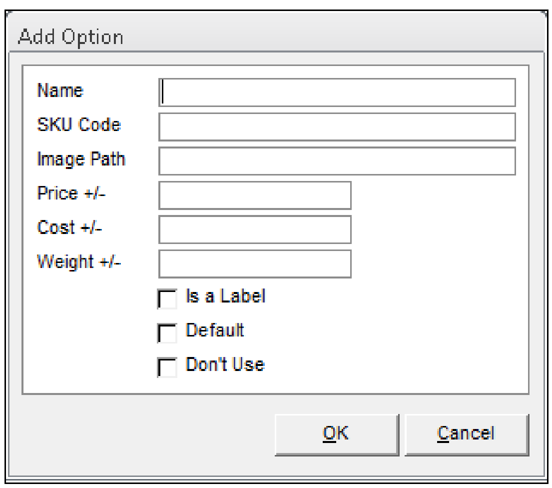
3. Enter a **List Name**, a **Prompt**, and an **Image Path** for the option list.
4. Enter any additional **Price**, **Cost**, or **Weight** that the list carries with it.
5. Select an **Option Type** (drop-list, radio button, check box, etc.). Note that the type selected here is only for Miva Merchant shopping carts, and does *not* affect how option lists are displayed in The Stone Edge Order Manager!
6. Indicate whether an option is **Required** to be selected when the order is placed.
7. Check the **Use when building SubSKUs** box to build SubSKUs based on the option list. The Stone Edge Order Manager can create separate SKUs (products) for each combination of options so you can track your inventory accurately. Refer to ***Building SubSKUs***, in this chapter, for more information.)
8. When you are finished, click the **Save** button. The system updates the **Option Lists** with the new or altered information.

Now that you have created the option list, you can create the individual options that make up the list.

Creating and Editing Options

Complete the following steps to create or edit an option for one of the option lists assigned to an item in your inventory:

1. Locate the item in the **Inventory** window and select the **Attributes/Options** tab. Select the Option List to work with.
2. Click the **Add Option** button, or select the **Option** to be edited and click the **Edit Option** button. The system displays the **Option** configuration window, indicating the item SKU and option list being modified:



Note: *Only the Name is required here. All other fields are optional. Some of these fields are only used in conjunction with specific shopping cart systems.*

3. Enter a **Name** for the option (e.g. “Blue” or “Extra Large”). The name is the actual option that shows up in the option list.
4. The optional **SKU Code** can be used instead of the Name when building Sub SKUs. See ***Building SubSKUs*** for more information
5. The **Image Path** is only used with certain shopping cart systems.
6. Enter any additional **Price**, **Cost**, or **Weight** that the option carries with it.
7. Indicate whether the option you are defining **Is a Label** or should be the **Default** selection for the option list. These are only used with certain shopping cart systems, and do not have any

effect within The Stone Edge Order Manager.

8. You can turn the option "off" by selecting the **Don't Use** check box.
9. When you are finished, click the **Save** button. The system updates the **Option** for the selected option list with the new or edited information.

Repeat these steps to create all of the options for each item.

Deleting Options and Option Lists

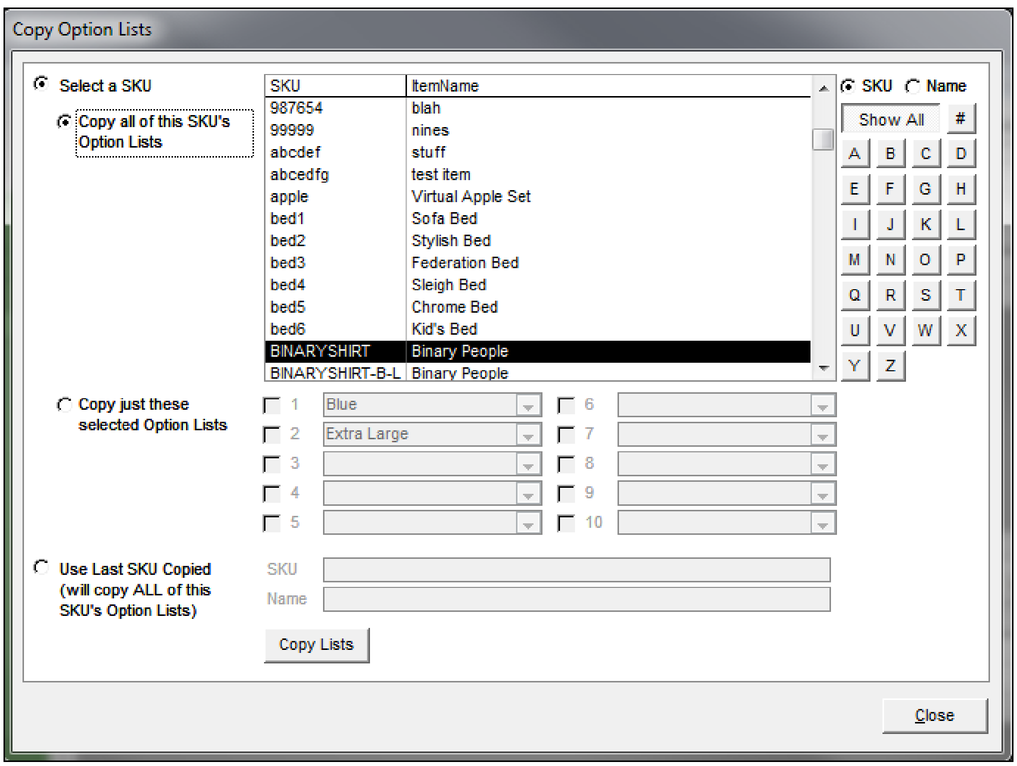
Delete an option or option list by selecting it from the **Attributes/Options** tab of the appropriate item. Then select the option and click the **Delete** button. The system displays a delete confirmation message. Click the **OK** button to proceed with the deletion.

***Note:** Deleting an Option List for an item deletes all Options within that list as well.*

Copying Option Lists

Complete the following steps to copy option lists and options from one product to another:

1. Using the **Inventory** window, locate the item that you want to copy the option lists *to*, and select the **Attributes/Options** tab.
2. Click the **Copy Options from Another Product** link in the accordion. The system displays the **Copy Option Lists** window:



3. Select the product that contains the option list(s) you want to copy from the SKU list. You can filter the products displayed in that list by selecting first letter o number of the **SKU** or **Name**.
4. You can choose to copy all of the product's options by leaving the **Copy all of this SKU's Option Lists** selected, or you can copy individual option lists by selecting **Copy just these selected Option Lists**.
5. Once you select a product from the list, you can see its option lists at the bottom of the screen.

6. Click **Copy Lists**.

Note: *Once an Option List has been copied from a product, it appears in the* ***Last SKU copied from:*** *section for the remainder of your session. To re-copy that product's options to another receiving product, select* ***Use Last SKU Copied*** *and then select* ***Copy Lists****.*

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7. When finished copying option lists, click the **Close** button.

The system displays the Inventory window with the newly copied option lists and options.

Building Sub-SKUs for an Item

Note: *This section deals with creating sub-SKUs for the current item being viewed. For information on creating sub-SKUs for all inventory items, refer to* ***Building Sub-SKUs for all Items***, later in this chapter*.*

Products that have many different "options" or "attributes" (color, size, style, etc.) cannot be tracked accurately without knowing the exact combination of options that were sold or received. To track inventory at the option or attribute level, you must create parent SKUs and sub-SKUs in The Stone Edge Order Manager. A parent SKU represents the basic product without any options or attributes. Sub-SKUs are the result of combining a parent SKU with every possible option or attribute to produce unique item identifiers. For example, if you sell a T-Shirt with the Parent SKU "ABC001", and a customer orders that shirt with the "Green" and "Extra Large" options, the sub-SKU for that particular shirt might be "ABC001-GR-XL".

Some shopping cart systems take care of that conversion, in which case they just come into The Stone Edge Order Manager as regular products. But other systems send The Stone Edge Order Manager the Parent SKU and the selected options. The Stone Edge Order Manager must then take care of the conversion. The Stone Edge Order Manager has many options for handling parent SKUs and sub-SKUs. That is an advanced feature of the program, and the complete details are beyond the scope of this manual. Please refer to the ***Knowledge Base*** for a complete explanation.

If the **Use when building Sub-SKUs** check box is selected when option lists are created, The Stone Edge Order Manager uses the option list to create separate SKUs (products) for each combination of options, so inventory can be tracked accurately at the attribute level. For instance, instead of having an inventory item (record) for "sweatshirts," there will be a unique inventory record for each size and color combination of sweatshirts that your store sells.

IMPORTANT: *Backup the data file when building sub-SKUs for multiple items or the entire inventory.*

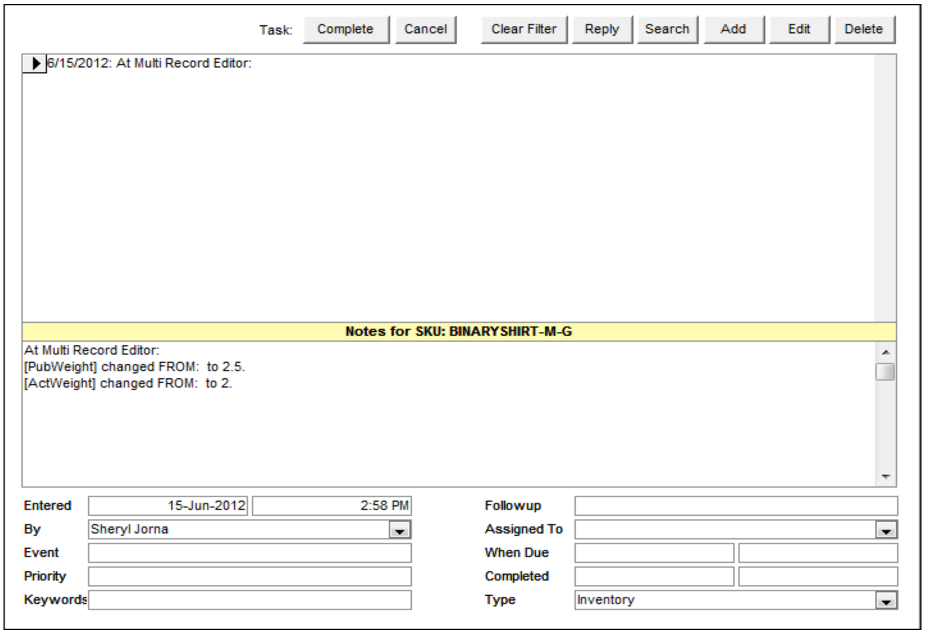
Refer to ***Creating and Editing Option Lists*** and ***Creating and Editing Options***, for more information on preparing the system to create sub-SKUs.

Complete the following steps to create sub-SKUs for an item:

1. Go to **Main Menu > Settings > System Functions,> Set System Parameters**. In Parameter Group, select **Order Options**. Select the parameter, **BuildSubSKUs** and set it to TRUE. Click **Save**.
2. If your product attributes (options) don't have a "code delimiter," (i.e. SKU code) then set the parameter, **AddToSubSKUIfNoCodeDelimiter** to TRUE. Click **Save**.
3. Using the **Inventory** window, locate the item for which you want to build sub-SKUs, and select the **Attributes/Options** tab.
4. Click the **Build Sub-SKUs for this Item** button. The system displays a confirmation dialog:
5. Click **OK** to build sub-SKUs.
6. Click **OK** to acknowledge the end of the process.

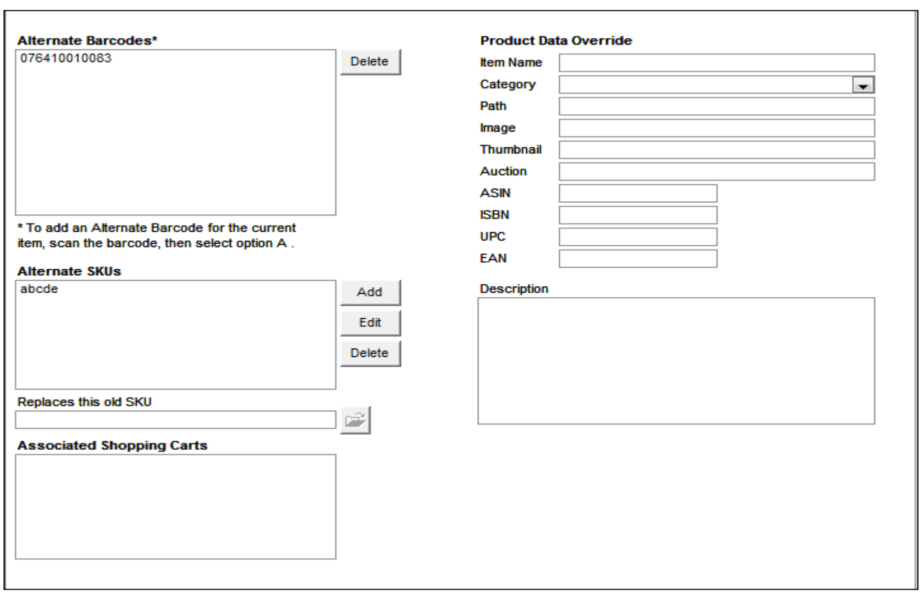
Notes Tab

The **Notes** tab is where notes or tasks related to the selected product are viewed and managed.



Refer to ***Checking Notes and Tasks***, in Chapter 2, for more information on viewing and processing Notes and Tasks.

Alternate Barcodes and SKUs Tab



Use the **Alternate Barcodes & SKUs** tab to view, add or edit any alternate barcodes or SKUs for the current product.

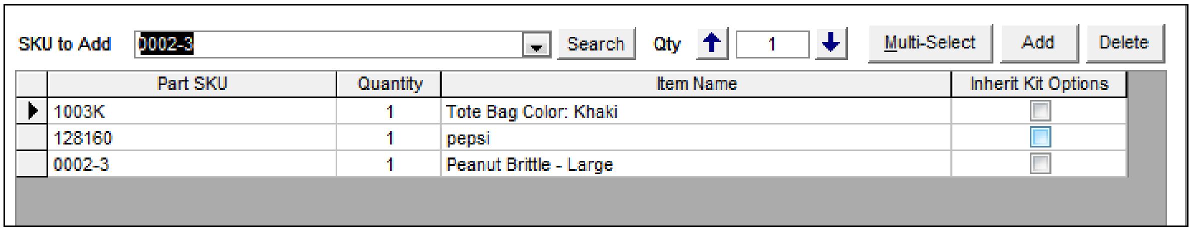
To create an alternate barcode, scan a barcode and select the **A** option to associate it with the item. To create an alternate SKU, click the **Add** button and enter the new SKU.

The **Replaces this old SKU** field on this screen is not used by the program in any way, it is there for internal information purposes only.

Kits Tab

A “Kit” is a product SKU that is made up of one or more other products. For example, if you sell gift baskets, a particular basket might consist of the basket itself, some cheeses, a tin of crackers, etc. Kits are generally put together at the time of shipping. (See **Assemblies and Kits**, later in this Chapter, for kits that are made up in advance.) Inventory is not tracked for the kit itself, but rather by the parts that make up the kit. The kit has a price but no cost and the parts in the kit have costs, but no prices. The parts can also be sold individually as regular products or in other kits.

The **Kits** tab is where the items that make up the kit are specified. Then, whenever a kit is sold, the QOH of all of the individual items that comprise the kit are adjusted accordingly.



The Stone Edge Order Manager assumes that kits are always in stock. When it creates an order record upon import, it enters a cost of zero for the kit but assigns the price charged on the website.

Manually entered orders are handled in the same way, except that the price assigned to the kit is the price that is stored in The Stone Edge Order Manager. The Stone Edge Order Manager then adds line items for each component in the kit. If inventory tracking is enabled, the system adjusts the inventory of the component pieces and backorders any items that are not in stock. Finally, it enters the cost of each item but sets the price of the parts to zero.

Creating Kits

Complete the following steps to add products already in your inventory to a kit.

1. Display the item that you want to convert to a Kit.
2. Click the **Kits** tab on the **Inventory** window.
3. Enter an **SKU to Add**, or **Search** for the SKU of a product to add to the kit.
4. Enter the **Qty** of the SKU to add to the kit.
5. Click the **Add** button. The system adds the product in the selected quantity to the Parts in this Kit list.
6. Repeat steps 3 – 5 until your kit is complete.

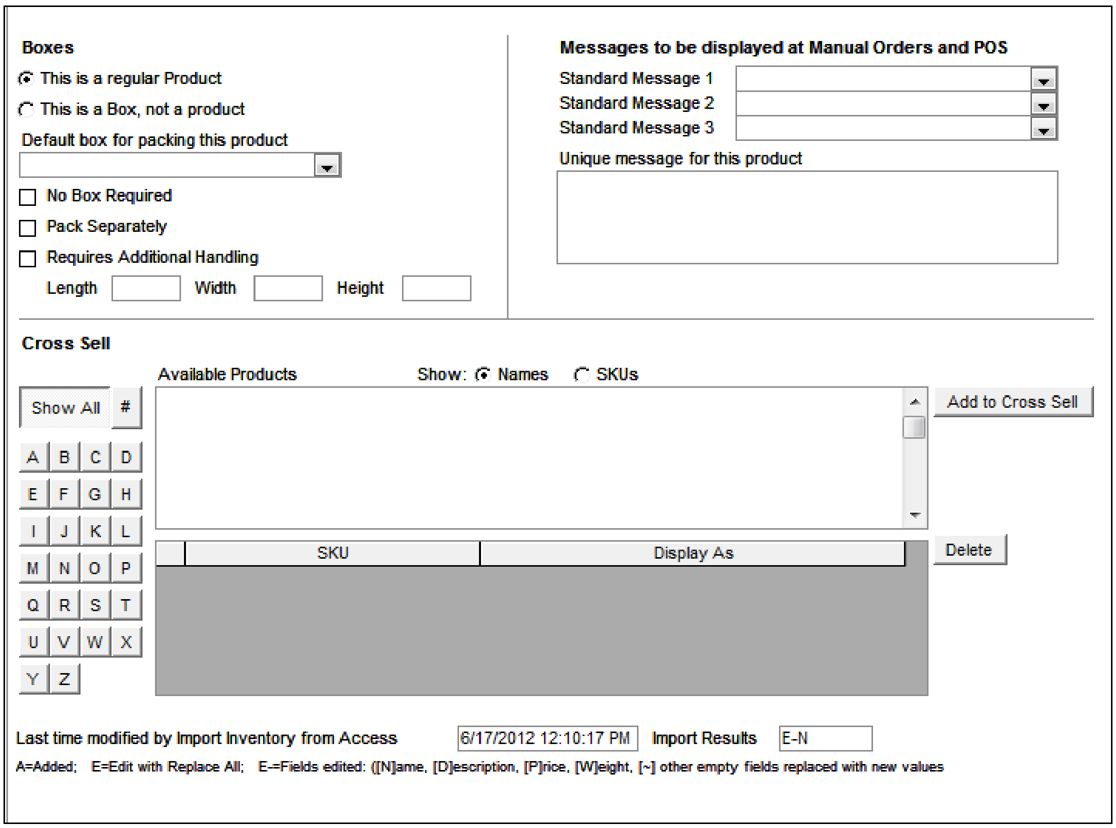
Once all items have been added to the kit, specify whether or not the component items **Inherit Kit Options** by selecting the corresponding check box. Inheriting options means that any options selected by the customer for the main Kit SKU (color, size, style, etc.) would also appear in the line items for those kit parts.

Kit parts can be deleted by selecting it and clicking the **Delete** button.

Miscellaneous Tab

The **Miscellaneous** tab contains additional information related to the current product:

- Indicate which products are actually boxes used for shipping actual products.
- Select a default box to use for packing each product.
- Enter the dimensions of each product.
- Select messages to be displayed to you when certain products are added to a Manual or POS order.
- Designate cross-sell products for the program to display when the current product is added to a Manual or POS order.



Configuring an Item's Box Settings

The **Boxes** area of the **Miscellaneous** tab is where you can define the item as a box, or specify which box should be used when shipping the item.

Complete the following steps to configure the item's box settings:

1. Using the record select arrows at the bottom of the **Inventory** window, locate the item for which you want to configure box settings. Select the **Miscellaneous** tab.
2. Click the **Edit** button. The system unlocks the item for editing.
3. Select either **This is a regular Product** or **This is a Box, not a product**. Entering that information lets the program track the quantity on hand for each of the boxes you use.
4. If there is a **Default box for packing this product**, select it from the drop-down list.
5. If there is **No Box Required** when shipping this product, select that check box.

6. If the item should be **Packed Separately**, select that check box.
7. If the item is a box, enter its dimensions in the **Length**, **Width**, and **Height** fields.
8. When you are finished, click the **Save** button.

The system saves the box settings you entered for the item.

Entering Messages for an Item

The **Messages to be Displayed at Manual and POS** area of the **Miscellaneous** tab allows up to three standard messages to be selected, and/or enter a custom message to appear whenever this item is added to a Manual or POS order.

Complete the following steps to enter messages for the item:

1. Using the record select arrows at the bottom of the **Inventory** window, locate the item for which you want to configure box settings and select the **Miscellaneous** tab.
2. Click the **Edit** button. The system unlocks the item for editing.
3. Select up to three **Standard Messages** from the drop-down lists, or enter a custom message in the **Unique message for this product** field. The standard messages are defined at **Main Menu > Settings > Inventory Functions > Standard Messages**.
4. When you are finished, click the **Save** button.

The system saves the message settings that you entered for the item.

Managing Cross-Sell Items for a Product

Cross-selling can help to increase profits by selling related items with each order. When an item is added to a Manual or POS order, The Stone Edge Order Manager can display a list of related products. The person taking the order can then ask the customer if they would like to purchase any of those additional items. Use the **Cross Sell** area of the **Miscellaneous** tab to select the cross-sell items for the current product.

Complete the following steps to configure the cross-sell products for the current item:

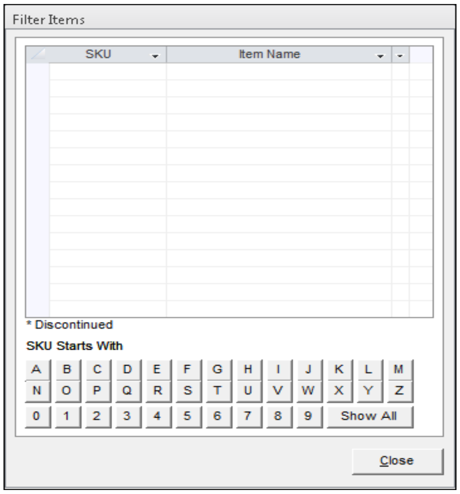
1. Using the record select arrows at the bottom of the **Inventory** window, locate the item and select the **Miscellaneous** tab.
2. Filter the list of **Available Products** by clicking a **First Letter of Product** button. Select a cross-sell item from the **Available Products** list.
3. Click the **Add to Cross Sell** button or double-click the item. The system adds the product to the list of cross sell items at the bottom of the window.

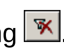
Cross-sell items are displayed in a popup window whenever the item being viewed is added to a Manual or POS order.

Selecting an Item to View

This option provides a quick way to select and view specific products based on the first character in their SKUs.

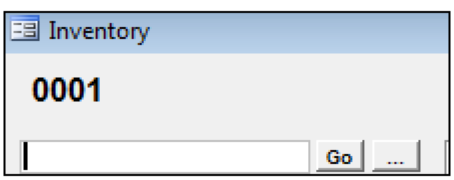
1. Click the filter button  on the **Inventory** window to open the Filter Items screen.



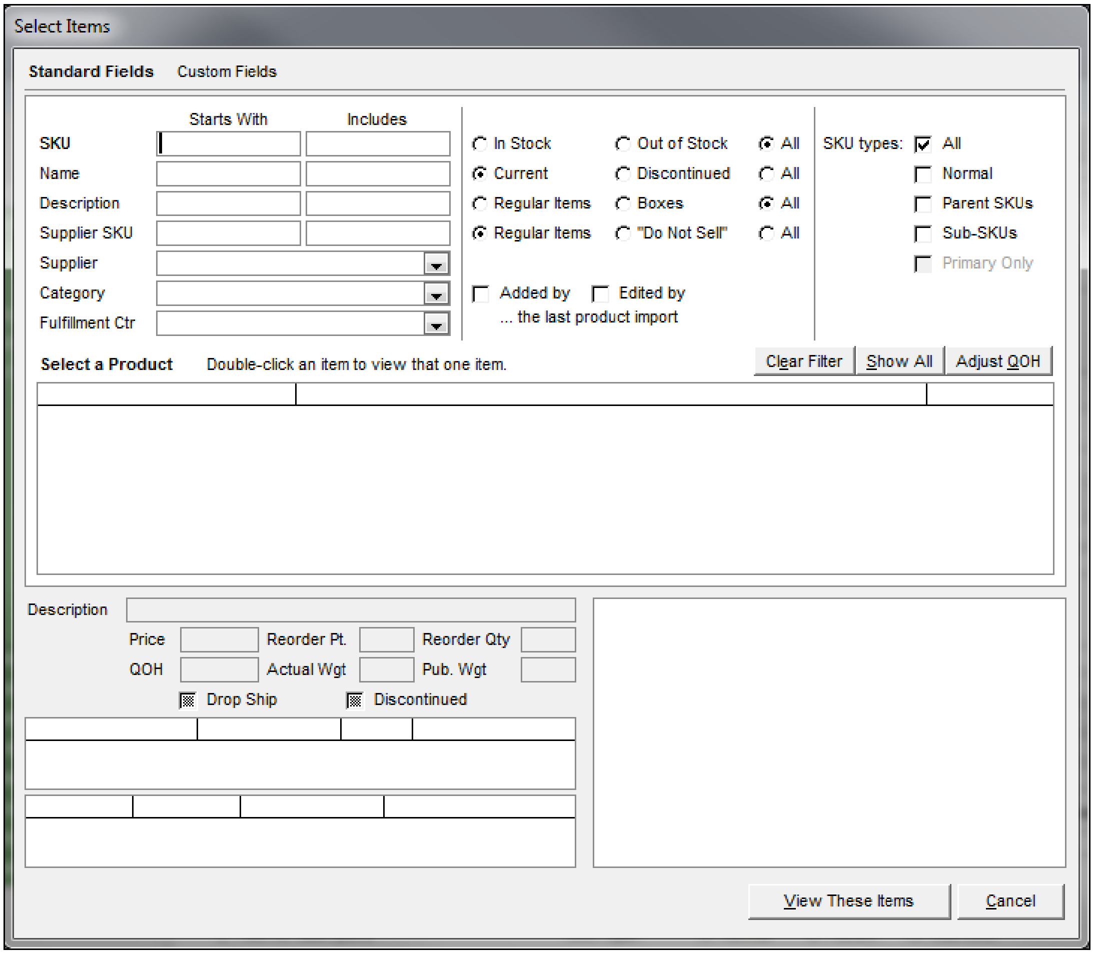
2. Select (click) a number or letter to view **SKUs** that begin with that character or click the **Show All** button to display all items.
3. Select the item by clicking its row. The system displays the selected item in the **Inventory** window in the background.
4. Select a different item on the **Select Items** window to view that item. Repeat as needed.
5. Click the **Close** button to close the **Select Items** window.
6. The current filter can be removed from the Inventory form by clicking . All inventory items are then displayed.

Searching for Items

Use the text box in the upper left-hand corner of the Inventory screen to do a quick search for a product by entering all or part of the product's name and clicking **Go.**



The traditional Search screen is opened by the unlabeled button adjacent to the **Go** button.



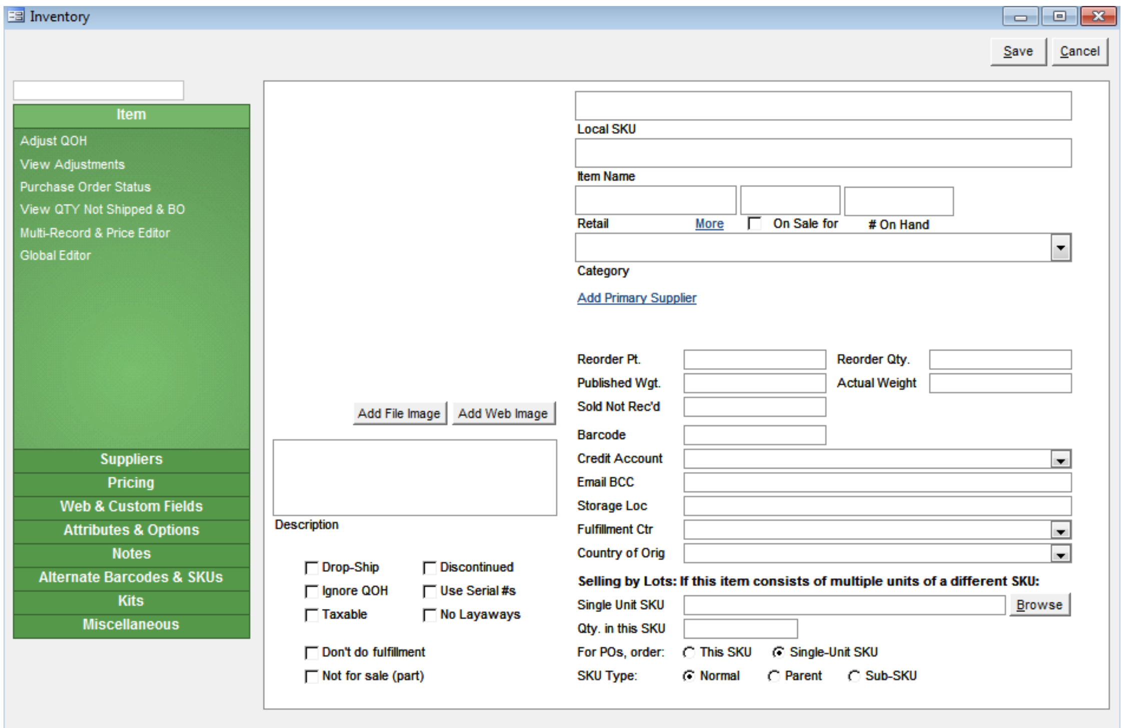
1. Enter or select the desired search criteria in the appropriate fields or buttons. Enter a partial SKU, Name or Description in the **Starts With** or **Includes** field to search for items that either begin with or include the characters entered. If search data is entered in more than one field, the program will only find products that match ALL of the search criteria.
2. Press **Tab** or **Enter**. The system displays all matches for the entered data in the **Select a Product** list.
3. Select (single-click) any of the products in the **Select a Product** list to view that item's information.
4. The inventory count for the selected product can be changed by clicking the **Adjust QOH** button, which opens the **Adjust Inventory** form.
5. Click the **Clear Filter** button to remove the current selection criteria and empty the **Select a Product** box.
6. Click the **Show All** button to list all inventory items in the **Select a Product** list.
7. Click **View These Items** to see all items in the search list at the **Inventory** window, where they can be browsed using the navigation buttons at the bottom of the screen.

Inventory Functions

Creating a New Item

***Note:** Each inventory item must be associated with a "primary supplier" and the information in this section of the manual assumes that supplier information has already been imported into The Stone Edge Order Manager during initial program setup.*

The **Add** button creates a new "blank" item record that can be filled in to create a new product in The Stone Edge Order Manager.



***Note**: Many of the shopping carts supported by The Stone Edge Order Manager enable direct Product Import via the Internet. If your cart supports that function, go to **Main Menu >Settings > Shopping Carts > Additional Functions** or **Import My Orders > View My Shopping Carts > Additional Functions** to import inventory from a specific shopping cart. Product information can also be imported from a text file or Microsoft Access database.*

1. Enter a unique **Local SKU** for each new item. This is how items are identified in the program. SKUs can include letters, numerals, spaces, underscores (_) and dashes (-). We do not recommend using other punctuation marks. In particular, they must ***not*** include quotes ("), apostrophes ('), commas (,) and semicolons (;). SKUs are limited to 250 characters in length, however, there are many places in the program that can only display about 40 characters, so think small!
2. Enter an **Item Name**. Provide a brief description of the item.
3. Enter the **Retail, Sale,** or **More,** price levelsinformation.
4. Enter the **# On Hand** and **Category**
5. Select **Add Primary Supplier** to designate a supplier, Unit Cost and other supplier related information, such as their purchasing rules.

a) Choose **by the Piece**, **by the Lot**, or **by the Piece in fixed Lots** by the piece, by the lot, by the piece in fixed lots (this is not typical). If this item is NOT a lot, leave it set to the default, **by the Piece**.

b) If the supplier of this item has a **Minimum Order Qty**. minimum order quantity, enter that number in the field. If the item IS a lot, select **Lots**, otherwise leave it set to **Pieces**, which is the default.

6. Depending on how you want to re-order inventory, enter the **Reorder Point** and **Quantity**, or **Target**s.
7. Enter **Published Wgt** and/or **Actual Weight**. The published weight is the weight displayed to customers at the website. The actual weight is used to calculate shipping costs. Enter weights as generic units (do not specify a unit of measure).
8. **Sold Not Rec'd** shows the number of units of the product considered to be sold although they have not been received from the supplier.
9. Optional: Enter a **Barcode**.
10. Optional: Select a **Credit Account** for QuickBooks.
11. Optional: **EmailBCC** Enter an email address to receive a blind carbon copy of emails.
12. Optional: Enter a **Storage Loc**. Only a single location per product can be entered presently.
13. Optional: Select a pre-defined **Fulfillment Ctr**.
14. Select the **Country of Orig**.
15. The **Selling by Lots** box is where an item is designated as a "Lot," i.e., an item comprising multiple single unit SKUs. For more information about lots, see ***Purchasing in Lots*** in Chapter 4. If the item is NOT a lot, go to Step 6. If the item IS a lot, complete the following steps:

    a) Enter the **Single Unit SKU** of the item which comprises the lot. A Single Unit SKU is the individual piece that makes up a lot. Enter the number of single pieces that make up the lot in the **Qty. in this SKU** field.

    b) Choose which SKU to use **For Purchase Orders**: **This SKU** (i.e., the lot SKU) or the **Single-Unit SKU**. When you create a purchase order the Single Unit SKU is displayed with the quantity needed to complete a lot by default. To display the Lot SKU on purchase orders, select This SKU.

Note: *For more information about defining "lot" items in your inventory and setting up supplier's purchasing rules, see **Purchasing in Lots** in Chapter 4.*

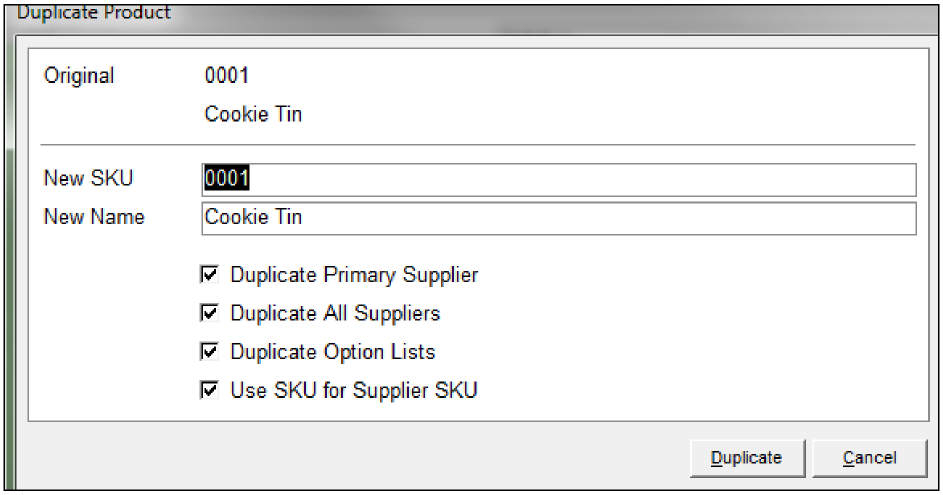
16. Leave the **SKU Type** SKU typeset to the default, **Normal**. If the system is set to build sub-SKUs for an item or items (system parameter BuildSubSkus) , it automatically designates **SKU Type** to Parent or Sub-SKU.)
17. Optional: Select **Add File Image** or **Add Web Image** to add images of the product.
18. Enter a **Description** of the product in the text box.
19. Optional: Select any of the check boxes that apply to the current product, such as Drop-Ship, Discontinued, etc.
20. When finished entering data for the new item, click the **Save** button..

Note: *If you do not already have unique SKUs for your products, The Stone Edge Order Manager can create unique numeric SKUs automatically. See the system parameters **AutoNumberNewSKUs** and **AutoNumberSKULength** for more information.*

Duplicating an Item

To create a new product that is similar to an existing item, use the **Duplicate** button to copy the information of the product currently being viewed to a new product record.. Complete the following steps:

1. Locate the inventory record to be duplicated.
2. Click the **Duplicate** button. The system prompts for a **SKU** and **Product Name** for the duplicate item.



3. Select (check or uncheck) whether to copy the Primary Supplier, All Suppliers, and/or Option Lists from the original item. You can also specify whether to designate this SKU as the Supplier SKU.
4. Click **Duplicate**. The system displays the new record in the Inventory screen.

Deleting or Editing an Item

The **Delete** and **Edit** buttons on the Inventory window allow you to remove or modify the records in the inventory database.

Edit – The current item is “unlocked,” and the fields in the record can now be changed. When finished editing the item, click the **Save** button to re-lock the record. Click the **Cancel** button to close the window without saving any changes.

Delete – The program prompts for confirmation as to whether the record currently being viewed should be deleted.

***Note**: If an item is used as a part in any kits, it cannot be deleted. If a product has been sold on any orders in The Stone Edge Order Manager, it is recommended to mark the item as discontinued instead of deleting it. To discontinue an item, use the **Edit** button, and then click the **Discontinued** check box on the Item Tab.*

Editing Multiple Items

The Stone Edge Order Manager offers two powerful tools that allow you to edit multiple records quickly:

Multi-Record Editor

The **Multi-Record Editor** is used to display an array of items in a grid, allowing them to be edited individually. It can also be used to quickly add new inventory records.

The **Global Editor** button at the top of this form provides a quick way to jump from the Multi-Record Editor to the Global Editor form. See the next section for more details on using the **Global Editor.**

The **Add Products** button allows you to add multiple inventory records at a single screen.

The **Filter** button is used to limit the products (SKUs) contained in the lower grid.

The **Select All** button causes all of the inventory field check boxes on all tabs to be selected.

The **Clear All** button de-selects all check boxes of the of the inventory fields.

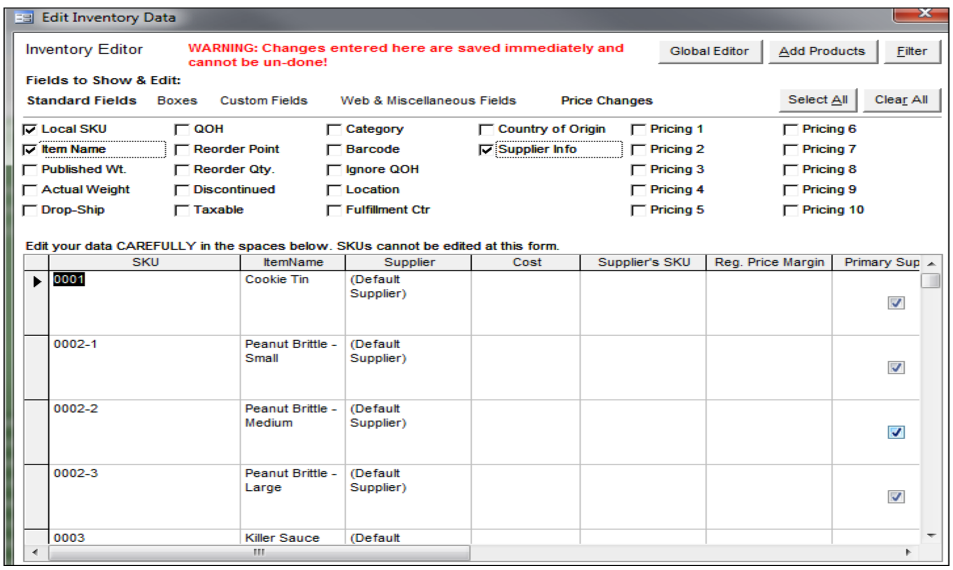
Be sure to view all of the possible fields that can be changed via the Multi-Record & Price Editor by selecting each of the tabs: **Standard Fields, Boxes, Custom Fields, Web & Miscellaneous Fields,** and **Price Changes**.

Complete the following steps to edit multiple records using the **Multi Record Editor**:

Warning: *All changes that are made to items using the Multi-Record Editor take effect immediately and cannot be undone. Be sure to back up the data file before proceeding.*

---

1. Open the **Multi-Record Editor** by going to **Main Menu > Manage My Inventory > View and Manage My Inventory > Item > Multi-Record & Price Editor**.



2. Use the **Filter** button to limit the products contained in the lower grid.
   a. Enter the desired criteria in the **Select Items** form.
   b. Click the **Edit Selected Items** button.
   c. The program returns to the **Edit Inventory** screen with the limited list of SKUs.
3. Use the check boxes on the tabs at the top half of the form to select which inventory fields to display in the lower grid.
4. Any of the fields visible in the grid *except* the **SKU,** can be edited. Note that changes are stored immediately and there is no way to revert back to the original value by clicking a **Cancel** or **Undo** button.
5. Click the **X** to close the screen when finished making changes.
6. Backup the data file.

Complete the following steps to add new items using the **Multi-Record Editor**:

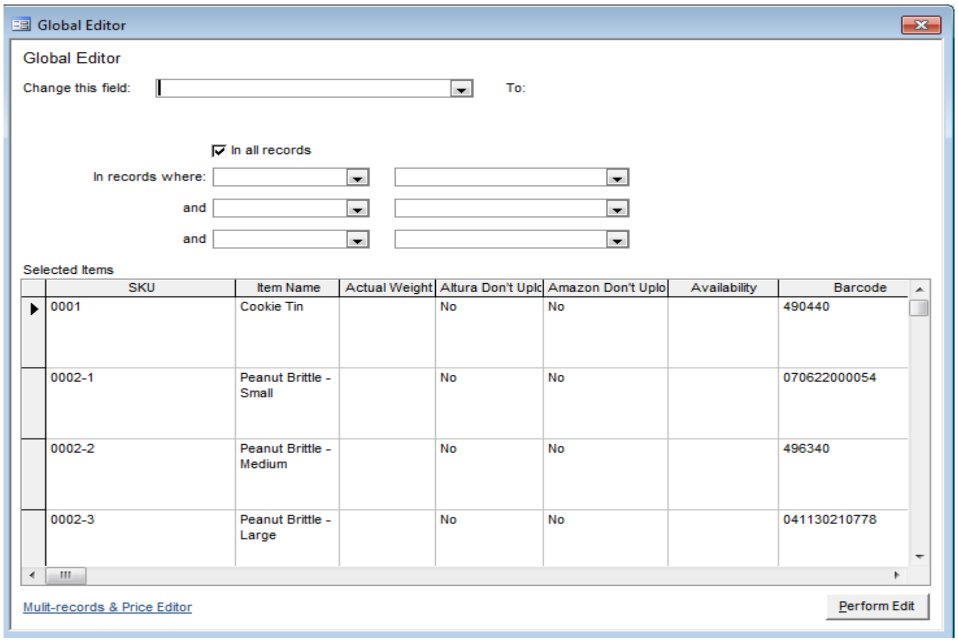
1. Click the **Add Products** button. A single row appears in the grid.
2. Enter data in the appropriate fields. Use the **Tab** button to move from one field to the next.
3. When leaving the last field of a row, a new blank row appears where the next new item can be added.
4. Click the **X** to close the screen when you are finished.
5. Backup the data file.

Global Editor

The Global Editor allows you to make global “find and replace” changes in a single field in all records, or selected records with just a few clicks.

***Note:** All changes made using the Global Editor take effect immediately and cannot be undone. Be sure to back up the data file before proceeding:*

1. Navigate to **Main Menu > Manage My Inventory > View and Manage My Inventory > Item > Global Editor**.



2. Select a field to be altered from the **Change this field:** drop-down list.
3. In the **To**: field, enter the new value to be placed in the selected field. Depending on the field type chosen:
   a. Enter text in the **To:** field
   b. Select an option from a drop-down list in the **To**: field.
   c. Click a **Yes** or **No** button that appears next to the **To:** field.
4. Either select the **In all records** check box to make a change affecting all records, or create conditions in the **In records where:** area. If conditions are specified, all the products that satisfy those conditions appear in the **Selected Items** grid.
5. When all of the desired fields have been filled in, click the **Perform Edit** button. The changes defined in steps 2 and 3 are made to the item records selected in step 4. For more information, refer to the *Knowledge Base*.

The **Multi-Record & Price Editor** link at the bottom of the form provides a quick way to jump to the Multi-Record Editor (*Edit Inventory*) form.

Receiving Items

The **Receive** button on the Inventory window allows you to receive non-purchase order items into the inventory database.

Note: *If the items being received are part of a purchase order, receive them through the Purchase Orders window. Refer to Receiving Inventory for POs, in Chapter 4, for more information.*

Complete the following steps to receive items individually:

1. Using the **Inventory** window, locate the item to be received.
2. Click the **Receive** button on the **Inventory** window.

3. Enter the number of items to receive in the **Quantity to Add** field.
4. Enter the **Cost per Unit** that was paid for the items.
5. Select whether you want to **Print Barcoded Labels** for the newly received items. You are prompted to enter how many labels to print if you select this check box.

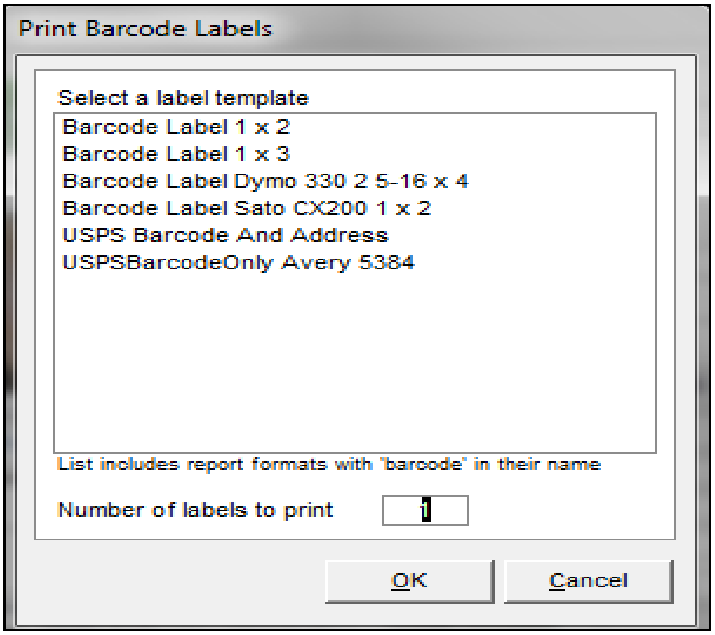
Note: *The layout of the bar code labels depends on the setting in the system parameter **BarcodeLabelTemplate.***

6. Click the **OK** button. The system adds the number that you entered to the item's existing Quantity on Hand figure.

Note: *It is possible to modify the **# on Hand** by clicking the **Adjust QOH** button and changing the current inventory value, if necessary.*

Printing Barcode Labels

1. Go to **Main Menu > Manage My Inventory > View and Manage My Inventory**.
2. Locate the desired product record.
3. Click the button labeled **Barcodes**.
4. Enter the number of labels to be printed for the item
5. Select a barcode format (report) from the list and click **OK**.



***Note:** The name of the report (template) that is specified in system parameter BarcodeLabelTemplate is highlighted. If a different report is chosen from the list, it temporarily overrides the value specified in the system parameter and becomes the default label format for that workstation until another report is selected from this window or the View Inventory form is closed.*

6. . The system displays the **Select a Printer** window, if **UseReportMenu** is set to TRUE.
   a. Use the default printer or check the **Selected Printer** box, select the barcode printer from the **Select a Printer** list on the left, and **Select a Paper Source** from the list on the right.
   b. Click **Print**. The system prints the selected number of barcode labels to the selected printer.

Transferring Inventory

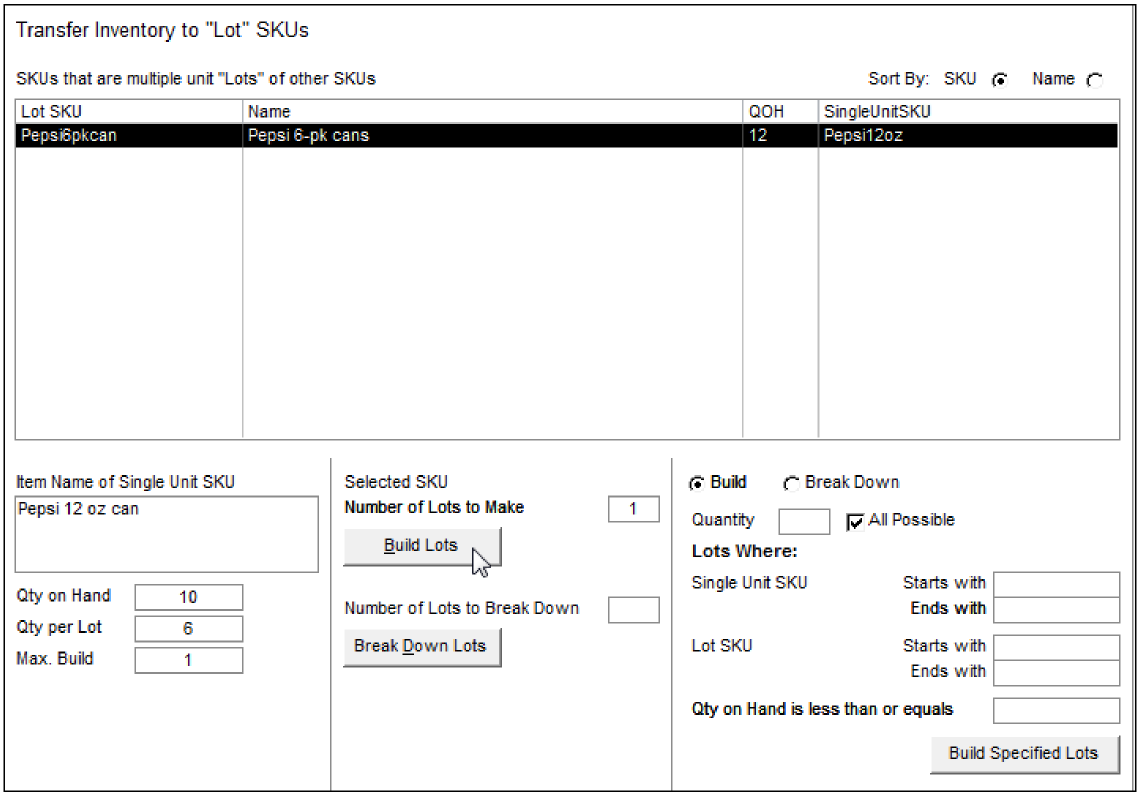
Transferring inventory refers to the process of building or breaking lots of a given product. A lot contains multiple pieces of the same product. Suppliers may require you to buy a given product in lots but you want to sell the individual pieces. Stone Edge allows you to receive the inventory in the form of lots but then you can logically break a lot into the individual pieces for resale. For example, if you sell batteries by the piece and also in packs of 10, inventory from the Single Unit SKU can be "transferred" to the Lot SKU. Packages of ten batteries can be sold in addition to single batteries. This provides an accurate inventory count at a glance. You can easily see how many single pieces there are in stock versus how many ten-packs are in stock. Conversely, if single pieces are almost sold out, but there are many ten-packs in stock, Lot SKUs can be broken down to replenish the inventory of single pieces.

***Note:** Before Lot SKUs can be built, **Single Unit SKUs** and **Lot Item SKUs** inventory records must be created. Refer to **Creating a New Item** and **Entering Product Information**, earlier in this chapter, for information on entering SKUs.*

Building a Lot from a Single SKU

Complete the following steps to transfer inventory:

1. Navigate to **Main Menu > Settings > Inventory Functions > Transfer Inventory**. The system displays the **Transfer Inventory to "Lot" SKUs** window:



2. Select a SKU from the list to build into lots.

Note: *The SKU list comprises inventory items, which were assigned an associated* ***Single Unit SKU*** *on the* ***Item Tab*** *of the* ***Inventory*** *screen (e.g., the item "bag of apples" would be assigned the Single Unit SKU for "one apple.")*

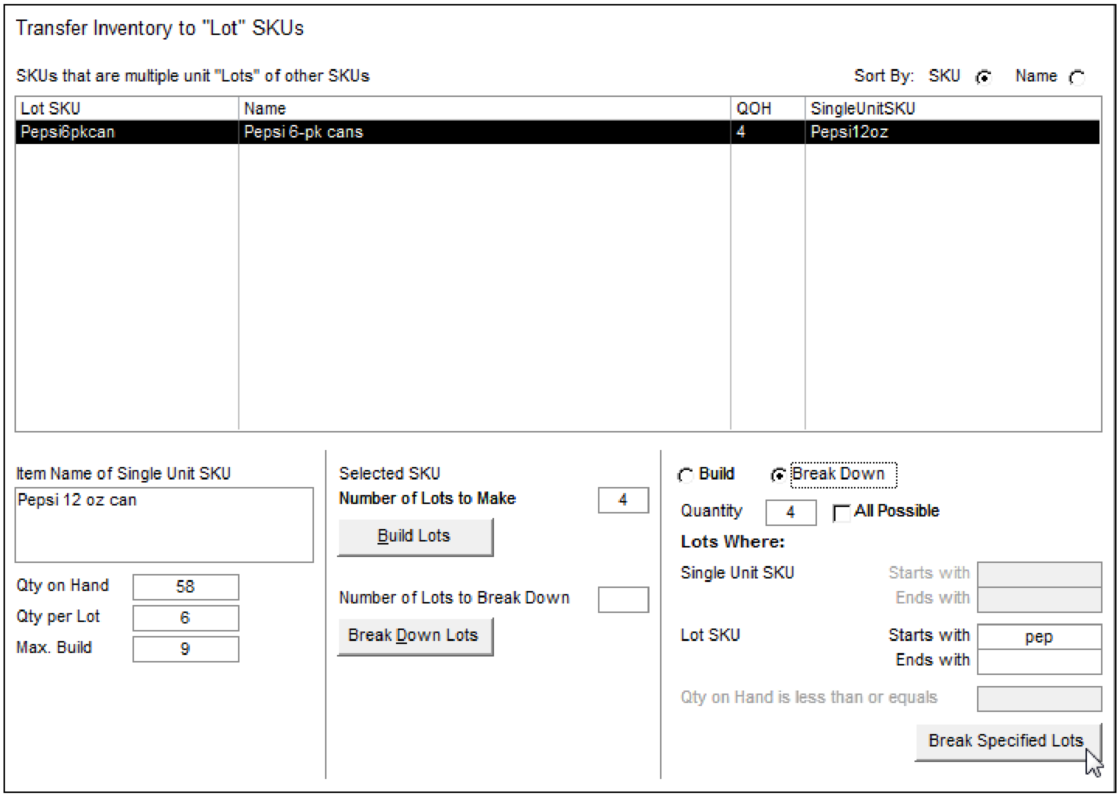
3. Enter the **Number of Lots to Make** and click **Build Lots**.

   The system reduces the inventory of the single piece SKUs by the number that it takes to make up the entered number of lots.

Note*: To Break Down Lots, follow the same procedures as above, but select* ***Break Down Lots*** *instead of* ***Build Lots****.*

Building or Breaking Down a Lot from a Range of SKUs

The lower right-hand corner of the Transfer Inventory screen is where you can Build or Break lots for all SKUs or selected SKUs which are defined as Lots in your inventory.



Use the following steps to work with a range of SKUs:

1. Select the radio button beside the operation to be performed: **Build** or **Break Down**.
2. Enter the **Quantity** of Lots to build or check the **All Possible** box.
3. Select the range of **Single Unit SKUs** from which lots will be built by entering common beginning or ending characters based on the naming convention in use. Or do the same for **Lot SKUs** that you wish to **Break Down**.

   Note: *A field is provided to specify the inventory level at which a lot should be broken down. For example, if a lot SKU begins with "SH" and the lot's QOH is less than or equal to 10, the program transfers the inventory to the Single Unit SKU.*

4. Click **Build Specified Lots**.
5. Click **Close** to exit the **Transfer Inventory to "Lot" SKUs** window.

Assemblies and Kits

Assemblies

Assemblies are used to build items from component parts or to break apart complete items and sell their individual components. Each assembly has its own SKU apart from its components' SKUs. The Assembly SKU must be added at the Inventory window. Refer to ***Creating a New Item***, earlier in this chapter, for information on how to create a new item SKU. Once you have created the SKU, it can be *defined* as an assembly.

When you *build* an assembly, the quantity on hand of its components decreases while the quantity on hand of the assembly increases; therefore, you transfer inventory from the component SKUs to the assembly SKU. The cost per unit of the assembly equals the total cost of its parts plus such things as labor, packaging, and handling fees, etc.

Kits

A kit is like an assembly in that it is made up of other products in your inventory, but The Stone Edge Order Manager does not track the quantity on hand for kits as it does for assemblies. QOH information is tracked by the parts, but not for the finished product.. Generally, if you pre-assemble and store the products before shipping them, you should use Assemblies. If you do not need to track the QOH for the finished product, use Kits.

The sections below offer help on creating and defining kits and assemblies:

Defining Assemblies

Building an Assembly from Component Products

Breaking Apart an Assembly into its Component Parts

Building Kits

Defining Assemblies

The **Assemblies** window is used to define assemblies, and also to build or break down assemblies. The program automatically adjusts the inventory appropriately.

Note: *An assembly SKU must be created at the* ***Inventory*** *window before components can be assigned to it.*

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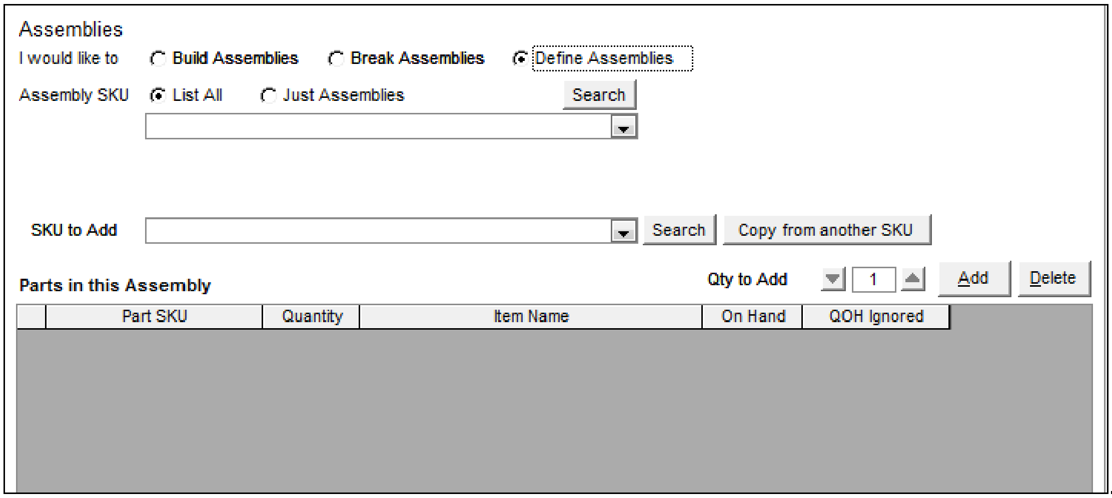
1. Navigate to **Main Menu > Settings > Inventory Functions > Assemblies**. The system displays the **Assemblies** window.
2. Select the **Define Assemblies** radio button at the top of the screen.



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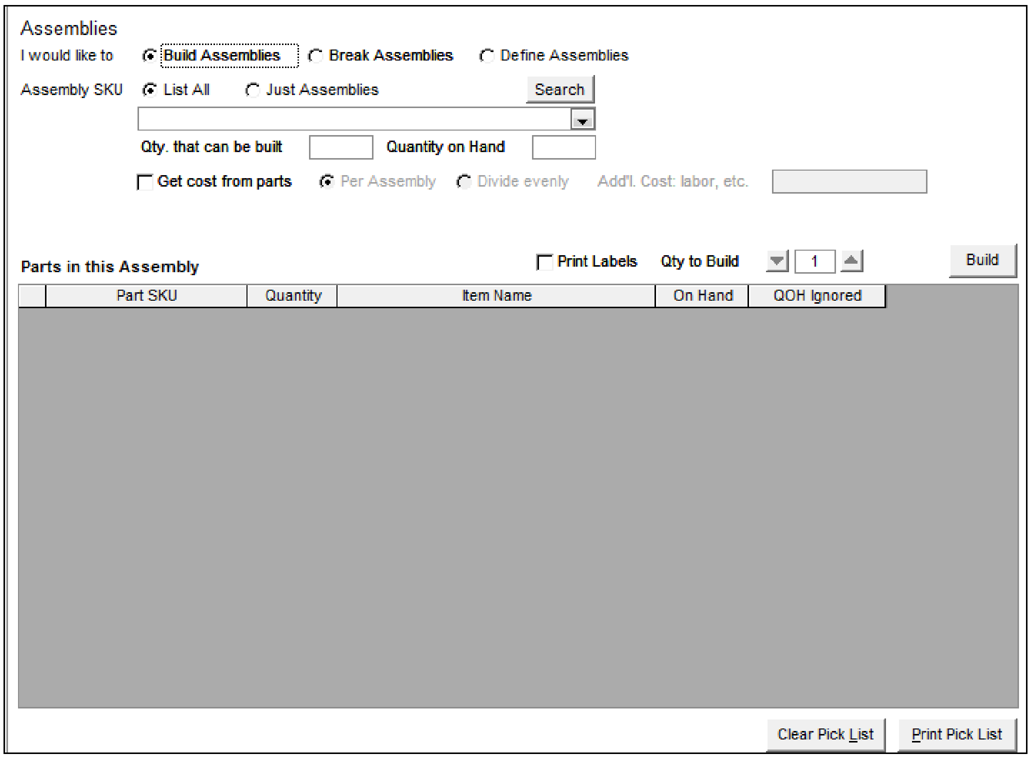
3. Select a SKU from the **Assembly SKU** drop-down list. Select **Show All** to see all SKUs in the drop-down list, or select **Just Assemblies** to see just those SKUs already defined as assemblies. Click the **Search** button to locate a particular SKU.
4. Select the SKU to be added to the current assembly from the **SKU to Add** drop-down list, or click the **Search** button or the **Copy from another SKU** button to select products to be added to the assembly. If the latter methods are used, the program prompts you as to whether the current list of products should be cleared before entering the newly selected items.
5. Enter the quantity of the item to be included in the current assembly by typing the number in the **Quantity to Add** field or clicking the **Up** and **Down** arrows next to it.
6. Click **Add**.
7. It is also possible to click the row of an individual assembly component and edit the quantity value directly in the **Quantity** field. The other fields are not editable here.
8. To remove a component from the assembly, click its row and then click the **Delete button.**

Building an Assembly from Component Products

Suppose you make and sell telephones. The telephones are made in advance of receiving any orders. When assemblies are built in The Stone Edge Order Manager, the program reduces the quantity on hand of the component SKUs (i.e., the bases, headsets, etc.), increases the quantity on hand of the assembly SKU, and provides a pick list to print. The pick list includes quantities and bin locations to pull the necessary items from inventory and physically build the designated number of telephones ordered.

Complete the following steps to build assemblies:

1. Navigate to **Main Menu > Settings > Inventory Functions > Assemblies**. The system displays the **Assemblies** window.
2. Select the **Build Assemblies** option at the top of the screen.



3. Select an assembly SKU from the **Assembly SKU** drop-down list. Select **Show All** to list all SKUs in the drop-down list, or select **Just Assemblies** to see just those SKUs already defined as assemblies. Click the **Search** button to search for a particular SKU.

***Note**: Above the **Parts in this Assembly** list box, the program displays **Quantity on Hand** of the current assembly and the number of assemblies that can be built based on the quantity on hand of the assembly's components.*

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4. To print a pick list including quantities and bin, click the **Print Pick List** button. (The report format used for printing is determined by the system parameter **AssemblyPickListTemplate**.)

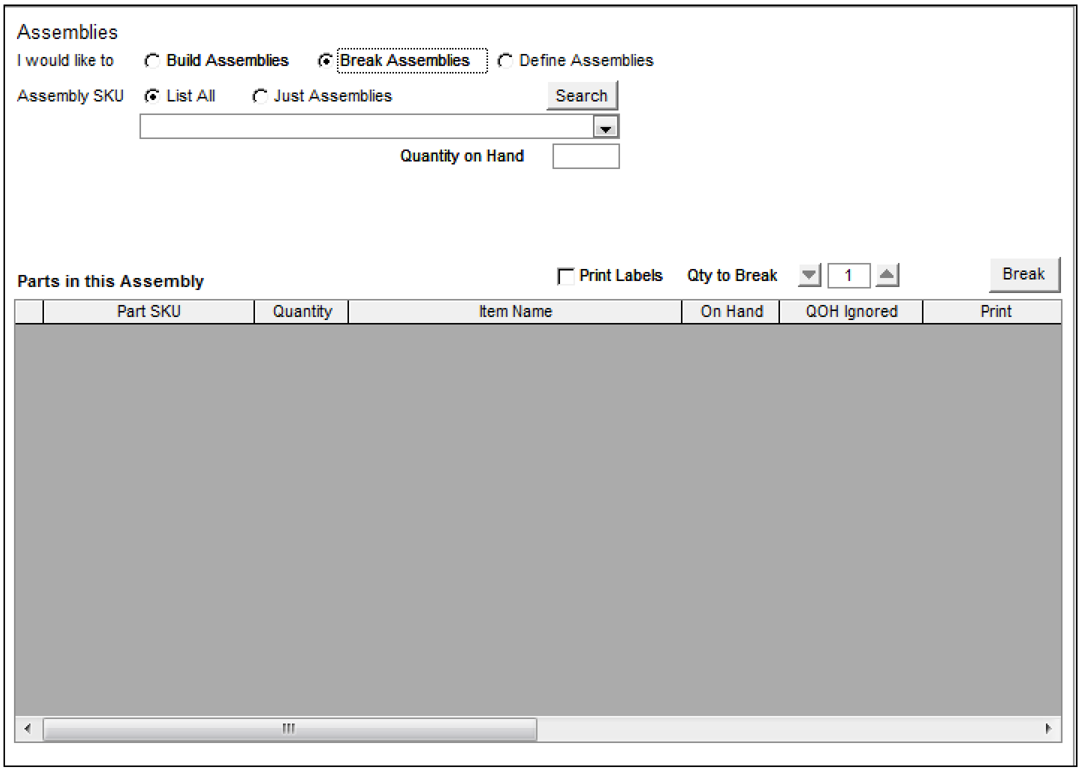
***Note**: As assemblies are built, the program stores a list of their components in a temporary file used to print the pick list. After you print a pick list, click the **Clear Pick List** button to empty the list and start a fresh list.*

Breaking an Assembly into its Components

Suppose you buy used desktop computers and take them apart and sell their hard drives, memory, DVD-ROM drives, etc. When an assembly is broken apart in The Stone Edge Order Manager, the program reduces the quantity on hand of the computer model (the assembly) and increases the quantity on hand of the individual components.

Complete the following steps to break apart an assembly and its components:

1. Navigate to **Main Menu > Settings > Inventory Functions > Assemblies**. The system displays the **Assemblies** window.
2. Select **Break Assemblies**.



3. Select an assembly SKU from the **Assembly SKU** drop-down list. Select **Show All** to see all SKUs in the drop-down list, or select **Just Assemblies** to only see those SKUs already defined as assemblies. Click the **Search** button to search for a particular SKU.

Note: *Above the* ***Parts in this Assembly*** *list box, the program displays the* ***Quantity on Hand*** *for the current assembly.*

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4. Enter the number of assemblies to be broken down in the **Quantity to Break** field by typing the number or by clicking the **Up** or **Down** arrows next to it.
5. Click the **Break Assemblies** button.

Building Kits

The **Define Kits** window is used to select the parts in a kit. *A new kit SKU should be created for new kits rather than re-using existing Kit SKUs.*

Note: *A kit can also be defined and have component parts assigned to it at the* ***Kits*** *tab of the* ***Inventory*** *window. The* ***Define Kits*** *screen allows kits to be created quickly from pre-defined inventory items at one screen.*

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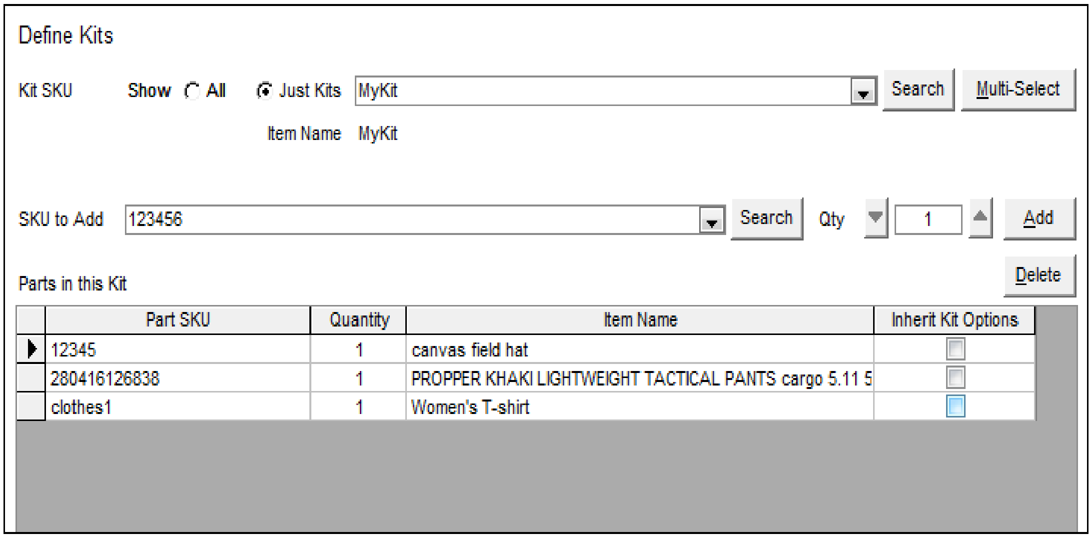
1. Navigate to **Main Menu >Settings > Inventory Functions > Kits**. The system displays the **Define Kits** window:



2. Select a kit SKU from the **Kit SKU** drop-down list. Select the **Show All** radio button to see all SKUs in the drop-down list, or select **Just Kits** to only those SKUs already defined as kits. Or click the **Search** button to search for a particular SKU.
3. Select the SKU that is to be added to the current kit from the **SKU to Add** drop-down list. Alternately, use the **Search** field to select an item.
4. Enter the quantity of the item to be included in the kit by typing the number in the **Qty** field or clicking the **Up** or **Down** arrows next to it.
5. Click **Add**.
6. The quantity of the item to be included in the kit may also be changed by clicking the row of the individual kit components and editing the value directly in the **Quantity** field. The Part SKU or Item Name fields are not editable at this screen.
7. To delete an item from the kit, click the row of an individual kit component and click the **Delete button**.

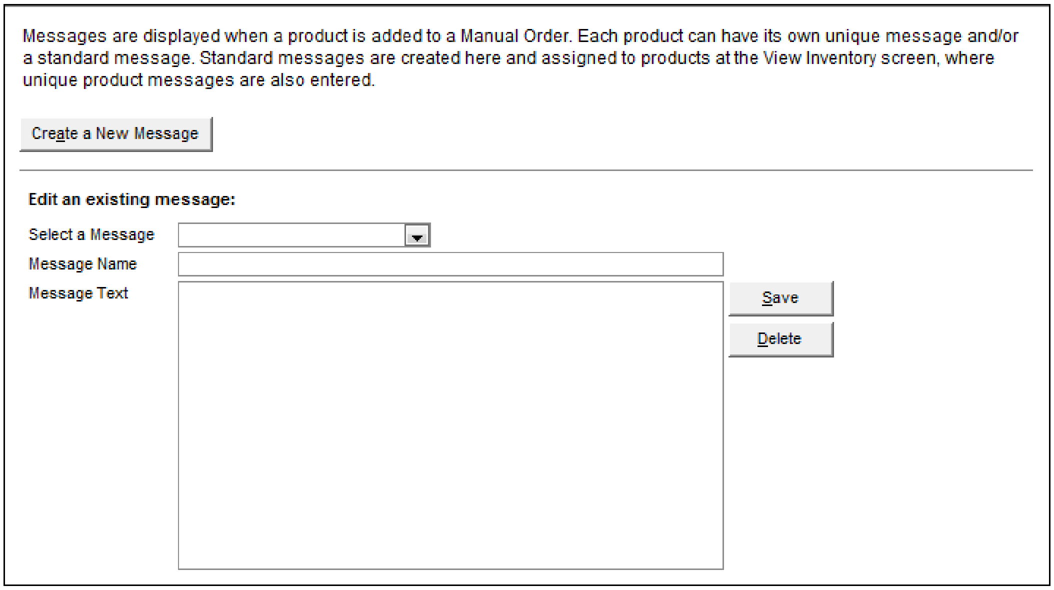
Standard Messages

Some merchants have products which require giving the buyer specific information or notices when those items are sold. For example, some items can only be sold to customers who are 18 or older, and others might require special handling when they are shipped. The Stone Edge Order Manager can display messages like that when Manual and POS orders are placed. There can be system-wide “standard” messages, shared by any number of products, and each product can have its own unique message, as well. Up to four messages can be displayed for any one product: three standard messages and one unique product message. The Standard Messages window allows you to create messages, which are assigned to products using the **Inventory** screen.

Creating a Message

Complete the following steps to view and/or add a message:

1. Navigate to **Main Menu > Settings > Inventory Functions > Standard Messages**. The system displays the **Standard Messages** window:



2. Click the **Create a New Message** button.
3. Enter a name for the new message and click the **OK** button.
4. Type the **Message Text** and click **Save**.

The message is now be available to add to any item in your inventory. Go to the Miscellaneous tab of the Inventory screen .One unique message for each product can also be assigned

Note*: View and edit your store's standard messages by selecting them from the* ***Select a Message*** *drop-down list. Click the* ***Save*** *button to save any changes that are made.*

Product Levels

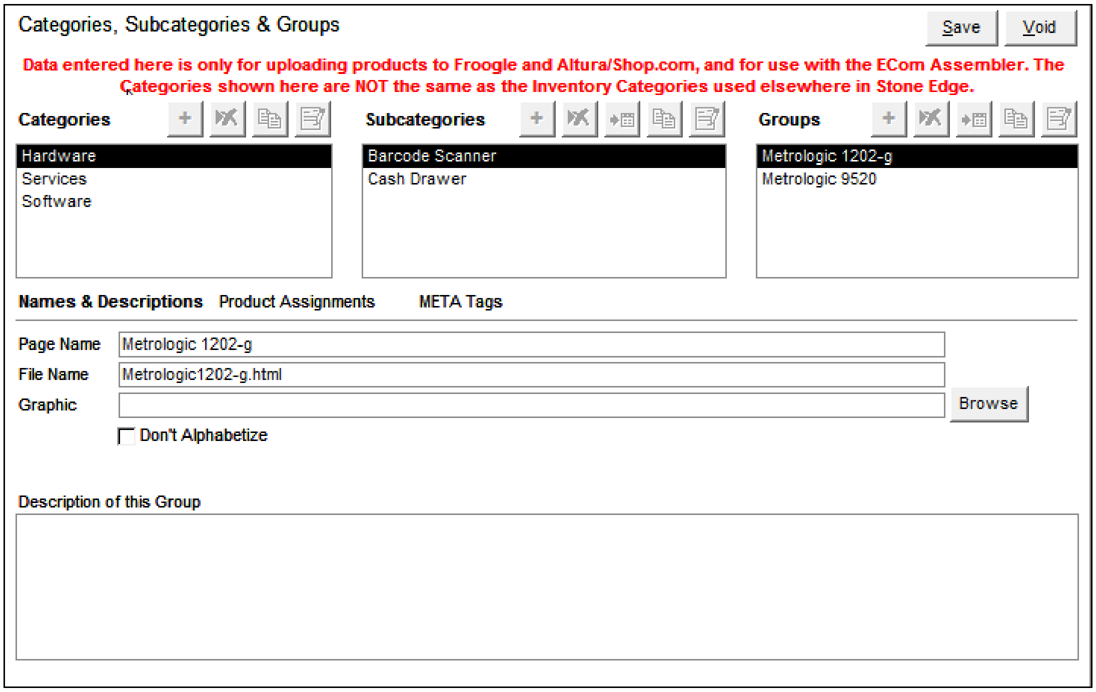
It is possible to create a three-level hierarchy of Categories, Subcategories, and Groups to help organize your product line. Assign each product to one or more of those levels. Refer to the ***Knowledge Base*** online for a further explanation of Product Levels.

Note: *"Levels" are only used by The Stone Edge Order Manager when uploading information about your products to Altura International (also known as Shop.com). If you use the Stone Edge Ecom Assembler (our Web catalog building program) and you have The Stone Edge Order Manager configured to share data with the Ecom Assembler, The Stone Edge Order Manager uses the Categories, Subcategories, Groups, and page assignments that are already set up in the Ecom Assembler.*

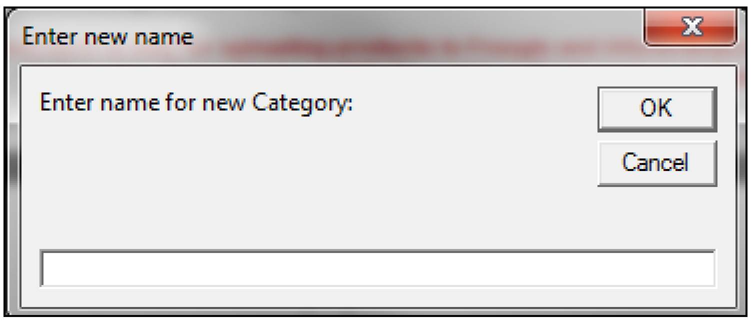
Creating Categories, Subcategories, and Groups

Complete the following steps to establish Levels:

1. Navigate to **Main Menu > Settings > Inventory Functions > Levels**.



2. Click the **Add** button under the **Categories**, **Subcategories**, or **Groups** heading. The system displays the following dialog:



Note: *To create a Subcategory, first select a parent Category from the list. Likewise, to create a Group, first select a parent Category and Subcategory from the lists.*

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3. Enter a location for the graphic in the **Graphic** field or click the **Browse** button to locate the file. No other information about the Category is required.
4. Click the **Save** button to save your changes.

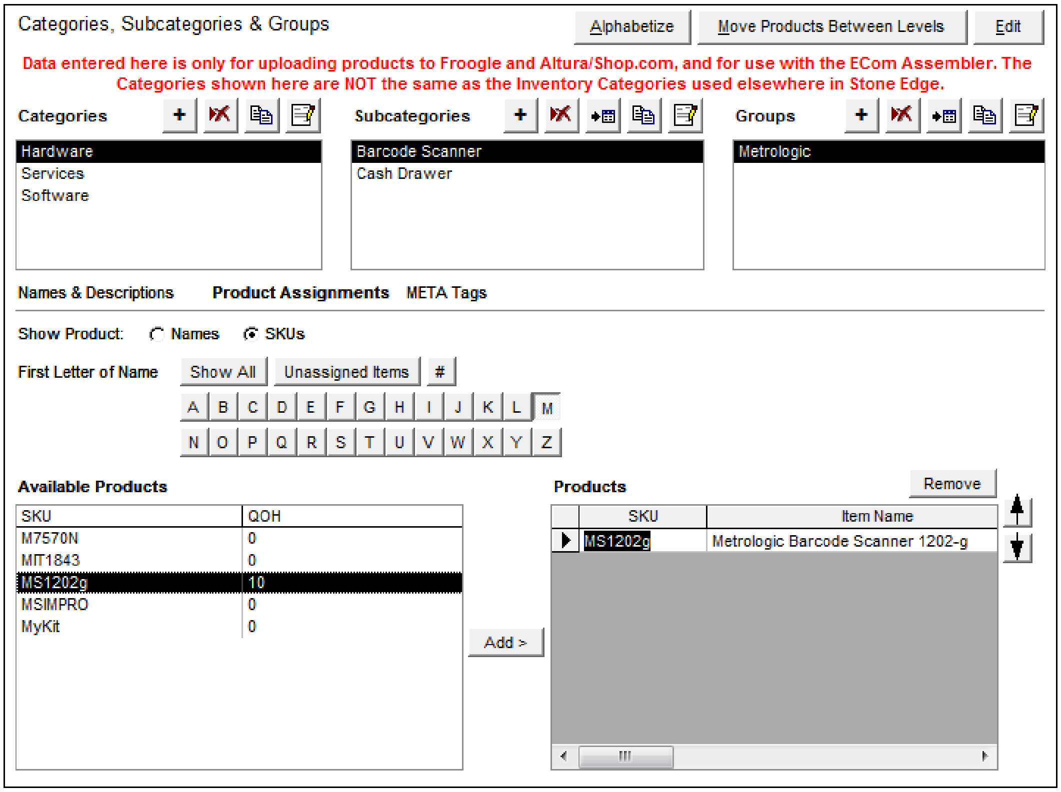
To create multiple levels, click the **Save** button after each Category, Subcategory or Group is created.

Assigning Products to a Level

Once product levels are created, it is possible to assign products to any number of Categories, Subcategories, and/or Groups.

Complete the following steps to assign products to a level:

1. Navigate to **Main Menu> Settings > Inventory Functions > Levels**.
2. Select the level to which products will be assigned.
3. Click the **Product Assignments** tab.



4. Use the **Show Product** or **First Letter of Name** controls to filter the list of **Available Products**. The list can be filtered by product **Name** or **SKU**.
5. Select a product in the **Available Products** list and click the **Add** button, or simply double-click the product.
6. Use the up or down arrow buttons on the right-hand side of the screen to change the order in which the items in the current level appear.

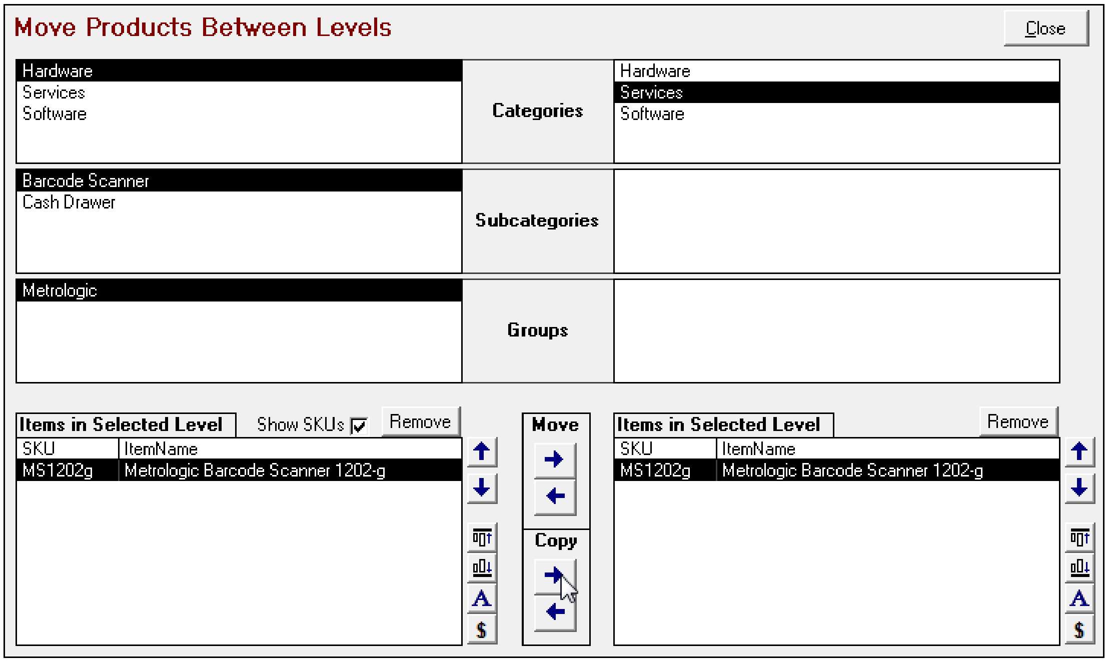
Note: *The sort order is only applicable to the Ecom Assembler, not Shop.com The Ecom Assembler uses the sort order when it builds Web pages for each level and needs to know the order in which to list the items on each page.*

7. To remove a product from a level, select it in the **Products** list and click **Remove**.

Moving Products Between Levels

Once products have been assigned to a level, they can easily be copied or moved between levels by clicking the **Move** or **Copy** buttons.

Open the **Move Products Between Levels** window:



1. Select a level from the **Categories**, **Subcategories**, or **Groups** lists on the left-hand side of the window.
2. Select a level from the **Categories**, **Subcategories**, or **Groups** lists on the right-hand side of the window.
3. Use the **Move** and **Copy** buttons on the bottom half of the screen to move or copy products from one level to the other.
4. Use the Up or Down Arrow buttons to change the sort order of the products within each level, or use the other buttons to move an item to the top or bottom of the list. The button labeled  sorts the list by Item name and the button labeled , sorts the list by price.
5. When finished, click the **Close** button.

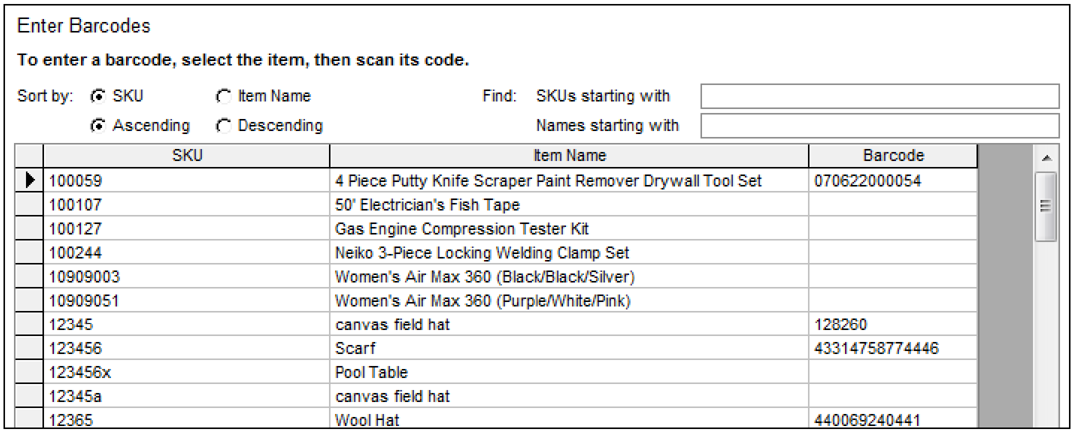
Note: *The sort order is only applicable to the Ecom Assembler, not Shop.com The Ecom Assembler uses the sort order when it builds Web pages for each level and needs to know the order in which the items on each page should be listed.*

Entering Barcodes

You may recall that a barcode can be added for an item when viewing its record in the **Inventory** window. The **Enter Barcodes** window can also be used to quickly enter barcodes for products. This window allows you to simply click the item in the list, scan its barcode and then move on to the next item in the list.

Complete the following steps to enter a barcode for an item using the **Enter Barcodes** window:

1. Navigate to **Main Menu > Settings > Inventory Functions > Enter Barcodes**. The system displays the **Enter Barcodes** window:



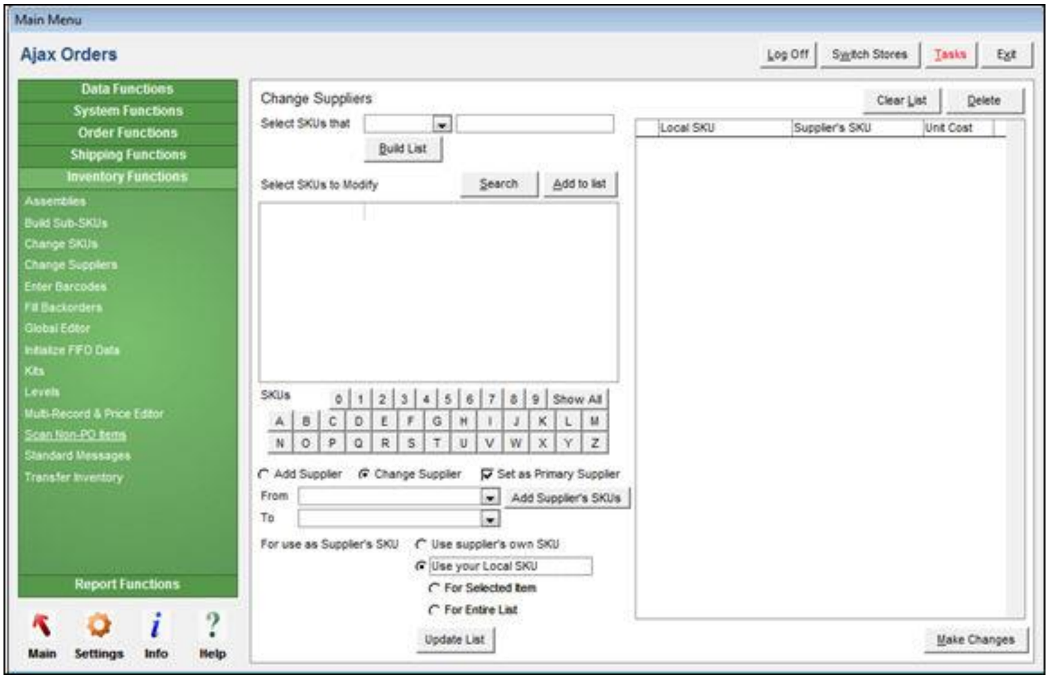
2. This window lists all SKUs in your inventory. Re-arrange the items by selecting a **Sort by:** option. It is also possible to search for products by entering search criteria in one of the **Find:** fields and pressing **Tab** or **Enter**.
3. Select an item by clicking its row.
4. Scan the barcode.
5. If you make a mistake or need to change the barcode for an item, select the item and scan the correct barcode. The program prompts you to override the incorrect barcode. Click the **OK** button to replace the existing barcode with the new one.
6. Click the **Close** button when you are finished.

Changing Suppliers

The **Change Suppliers** window is where supplier information can be added or changed for one or more items, including changing the item's default supplier. The Supplier's SKU can also be set as the Local SKU for the item(s). Before any changes can be made, a list of items must be created.

Complete the following steps to change suppliers for inventory items:

1. Navigate to **Main Menu > Settings Inventory and Suppliers> Change Suppliers**. The system displays the **Change Suppliers** window:



2. Build a list of SKUs by making a selection in **Select SKUs that** and entering all or part of a SKU in the adjacent text box.
3. Select the **Change Supplier** radio button.
4. Select the existing supplier in the **From:** drop-down list.
5. Select the new supplier from the **To:** drop-down list.
6. Click the **Build List** button. The system adds all of the SKUs that match the criteria to the list on the right.

Note: *It is also possible to click one of the letter or number buttons at the bottom of the window to filter the **Select SKUs to Modify** area to show only SKUs that start with the selected character. The **Search** button can also be used to specify other criteria to filter the list. Once items are seen in the **Select SKU(s) to Modify** pane, click the **Add to list** button. The system adds the selected SKU(s) to the list on the right.*

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7. Choose whether you would like to make the new supplier the primary supplier for the item(s) by selecting or de-selecting the **Set as Primary Supplier** check box.
8. Click the **Make Changes** button. The system changes the indicated supplier to the new supplier for the selected SKU(s).

Note*: The supplier SKU can also be changed by clicking the **Set Supplier's SKU=Local SKU** button, which sets the **Supplier's SKU** equal to the value in the **Local SKU** field for either the **Selected Item** or the **Entire List**, depending on the option you selected.*

Adding a Supplier to Items

Complete the following steps to add a supplier to a list of items:

1. Navigate to **Main Menu >Settings > Inventory Functions > Change Suppliers**. The system displays the **Change Suppliers** window.
2. Select **Add Supplier**. The system changes the **From** and **To** drop-down lists to a single **Add:** drop-down list.
3. Build a list of SKUs by making a selection in **Select SKUs that** and entering all or part of a SKU in the adjacent text box. .

__Note:__ Click one of the letter or number buttons at the bottom of the window to filter the __Select SKUs to Modify__ area to show only SKUs that start with the selected character. Click the __Search__ button to use other criteria to filter the list. Once the items are visible in the list box, select the SKU(s) to be modified, and click the __Add to list__ button. The system adds the selected SKU(s) to the list box on the right.

4. Select a supplier name to add to the selected items from the **Add:** drop-down list, or enter the new supplier's name in the field.
5. To make the new supplier the primary supplier for the item(s) as well, select the **Set as Primary Supplier** check box.
6. Click the **Make Changes** button.
7. Click **OK**. The system adds the selected supplier to the selected SKU(s).

__Note__: The supplier SKU can also be changed by clicking the __Set Supplier's SKU=Local SKU__ button, which sets the value in the __Supplier's SKU__ field equal to the value in the __Local SKU__ field for either the __Selected Item__ or the __Entire List__ (click the appropriate option).

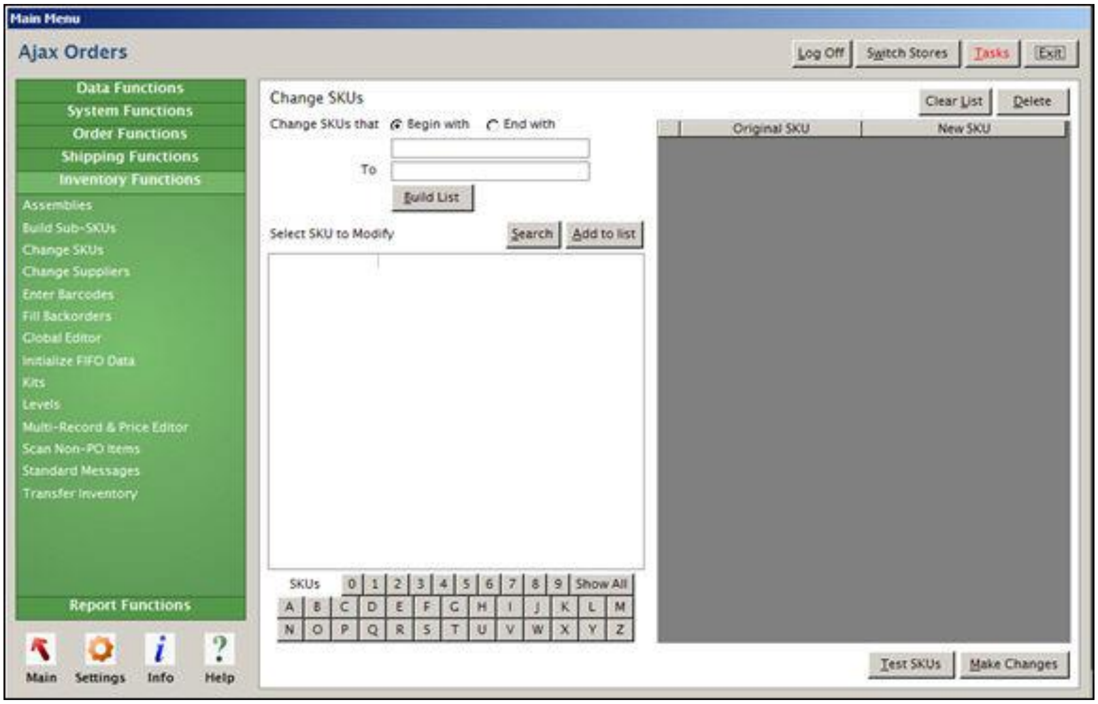
Changing SKUs

At the **Change SKUs** window, the SKUs of one or more existing products can be changed. The program changes the SKUs wherever they appear in The Stone Edge Order Manager's data, including any existing orders for the original SKU.

Note: Stone Edge Technologies, Inc. strongly recommends backing up The Stone Edge Order Manager's data file before using this feature!

Complete the following steps to change SKUs for existing inventory items:

1. Navigate to **Main Menu > Settings > Inventory Functions > Change SKUs**. The system displays the **Change SKUs** window:



2. At this screen, build a list of SKUs to be altered and indicate the new SKUs. No changes are actually made until the **Make Changes** button is clicked.
3. To build a list of SKUs and their modifications, choose the **Begin with** or **End with** radio button and enter the selection criteria in the first text box.
4. Enter the new SKU information in the **TO** text box.

   For example, to change all SKUs that begin with ACME to begin with AJAX, click the **Begin with** radio button and then type ACME in the first text box on the same line. Type AJAX in the **TO** text box. The program lists all of the SKUs beginning with ACME and how they will be changed (ACME001 to AJAX001, ACME Catalog to AJAX Catalog, etc.)
5. Click the **Build List** button.

***Note:** Another way to choose items to be modified is to click one of the letter or number buttons at the bottom of the window. Only SKUs that start with that number or letter are listed in the **Select SKUs to Modify** box. Similarly, the **Search** button can be used to specify criteria to filter the list. Once the items are visible in the **Select SKUs to Modify** list box, select the SKU(s) to be modified and click the **Add to list** button. The system adds the selected SKU(s) to the list box on the right.*

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6. Modify the data in the **New SKU** column, as necessary.
7. Click the **Make Changes** button. The system prompts for confirmation before taking action.
8. Click the **OK** button. The system changes each **Original SKU** to the **New SKU** indicated in the list on the right. The system displays a confirmation dialog.
9. Click **OK** to end the process.

Building Sub-SKUs for all Items

If you sell products that are available with different “options” or “attributes” (color, size, style, etc.), their inventory cannot be tracked properly without knowing exactly which combination of options has been purchased or sold.

A parent SKU represents the basic product without any options or attributes. The Stone Edge Order Manager creates sub-SKUs by generating an inventory record for every possible combination of the parent SKU and its options. The parent SKU and option codes are separated by a delimiter (that is determined by setting a system parameter) to create a unique sub-SKU for each item allowing their inventory to be tracked accurately.

***Note**: Some shopping cart systems take care of the conversion to sub-SKUs, in which case they just come in to The Stone Edge Order Manager as regular products. But other systems just send The Stone Edge Order Manager the Parent SKU and the selected options. The Stone Edge Order Manager must then take care of the conversion. The Stone Edge Order Manager has many options for handling Parent SKUs and Sub-SKUs. That is an advanced feature of the program and the complete details are beyond the scope of this manual. Please refer to the Knowledge Base online for a complete explanation.*

For example, suppose your store sells sweatshirts (SKU: **a0001**). There are three sizes: small, medium, and large. They all come in two colors: blue and red. When defining the options for that item, create SKU Codes for the option selections of size (**sum**, **md**, **leg**) and color (**blue**, **red**). Then, when The Stone Edge Order Manager builds the sub-SKUs, the system creates the items **a0001-sm-blu**, **a0001-sm-red**, **a0001-med-blu**, and so on. Note that you must create the option lists, options and SKU codes for each product that uses them before sub-SKUs can be built.

***Note:** The item records created when the sub-SKUs are built inherit most of the characteristics of the parent item. However, **Quantity on Hand** information for each sub-SKU must be manually entered.*

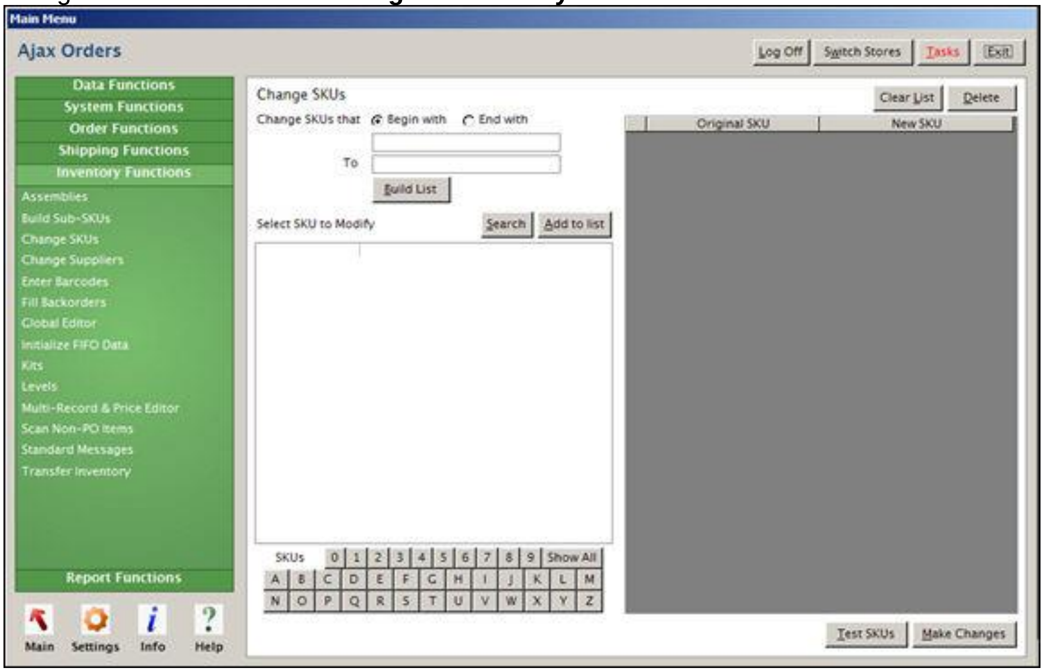
There are a number of parameters that can be set to control how The Stone Edge Order Manager creates sub-SKUs. Refer to the ***Knowledge Base*** online for more information about building sub-SKUs.

***IMPORTANT:** Backup the data file before building sub-SKUs. In the event that the result of building sub-SKUs is not what was expected, use that backup to restore the data file to its previous state. Refer to **Backing Up the Database**, in Chapter 2, for more information.*

Complete the following steps to build sub-SKUs for inventory items that have options:

1. Go to **Quick Click> System Parameters**. In Parameter Group, select **Order Options**. Select the parameter, **BuildSubSKUs** and set it to TRUE. Click **Save**.
   a) If the options don’t have a “code delimiter,” (i.e. SKU code) then set the parameter, **AddToSubSKUIfNoCodeDelimiter** to TRUE.
   b) Click **Save**.

2. Navigate to **Main Menu > Settings > Inventory Functions > Build Sub-SKUs**.



3. Select whether you would like to **Delete any un-needed Sub-SKU's**. (This only applies if parameter **DeleteOrphanedSubSKUs** is set to TRUE.
4. Select whether to create sub-SKUs for **All option list entries** or **Just products marked as "Parent SKU's**." The latter option allows the flexibility to define which items will be tracked by their options.
5. Click the **Build Sub-SKU's** button. The system builds sub-SKUs for the items with the option list entries that were indicated. When The Stone Edge Order Manager is finished, the system displays the result.
6. Click the **OK** button to finish.
7. If satisfied with the results, backup the data file.

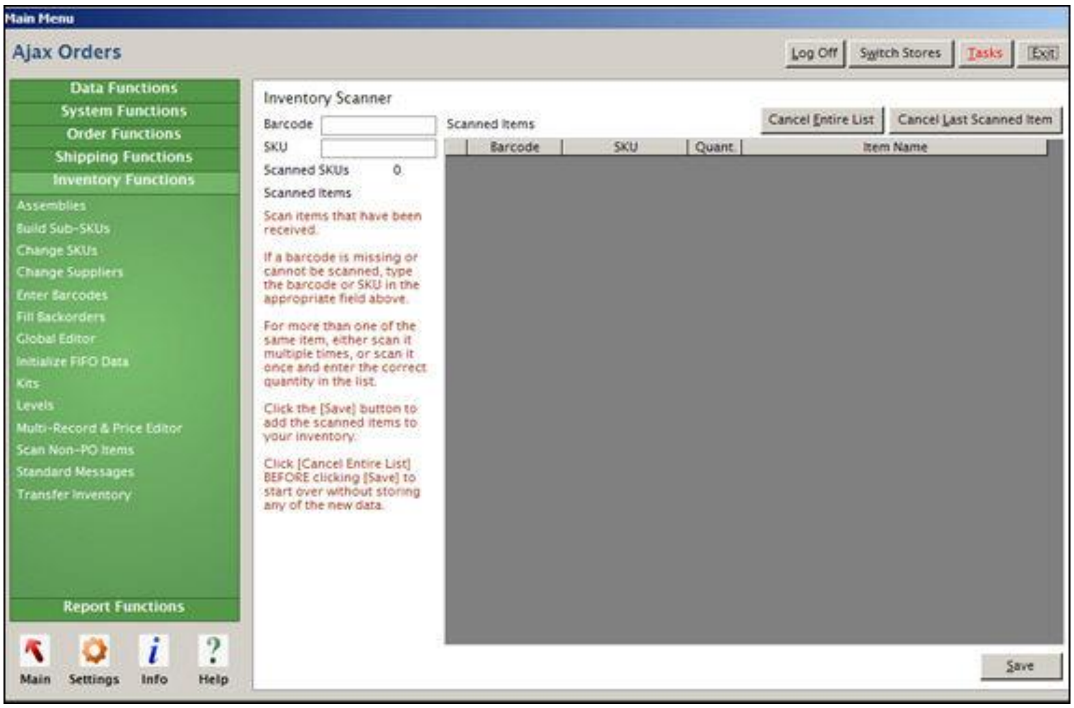
Receiving Non-Purchase Order Items

Non-Purchase Order Items are items that were ordered from a supplier, but not through a Stone Edge Order Manager purchase order.

Note: *This option is not compatible with FIFO Inventory Cost Tracking. Use the Receive Inventory function instead.*

Complete the following steps to receive non-purchase order items:

1. Navigate to **Main Menu > Settings > Inventory Functions > Scan Non-PO Items**. The system displays the **Scan Inventory** window:



2. Scan the **Barcode** of the item to be received, or enter its **SKU**. The system adds the item to the **Scanned Items** area.
3. Enter the quantity received in the **Quant.** column of the **Scanned Items** area.

   Note*: To clear the last item that was scanned, click the* ***Cancel Last Scanned Item*** *button at the top of the form. To start over completely, click the* ***Cancel Entire List*** *button.*

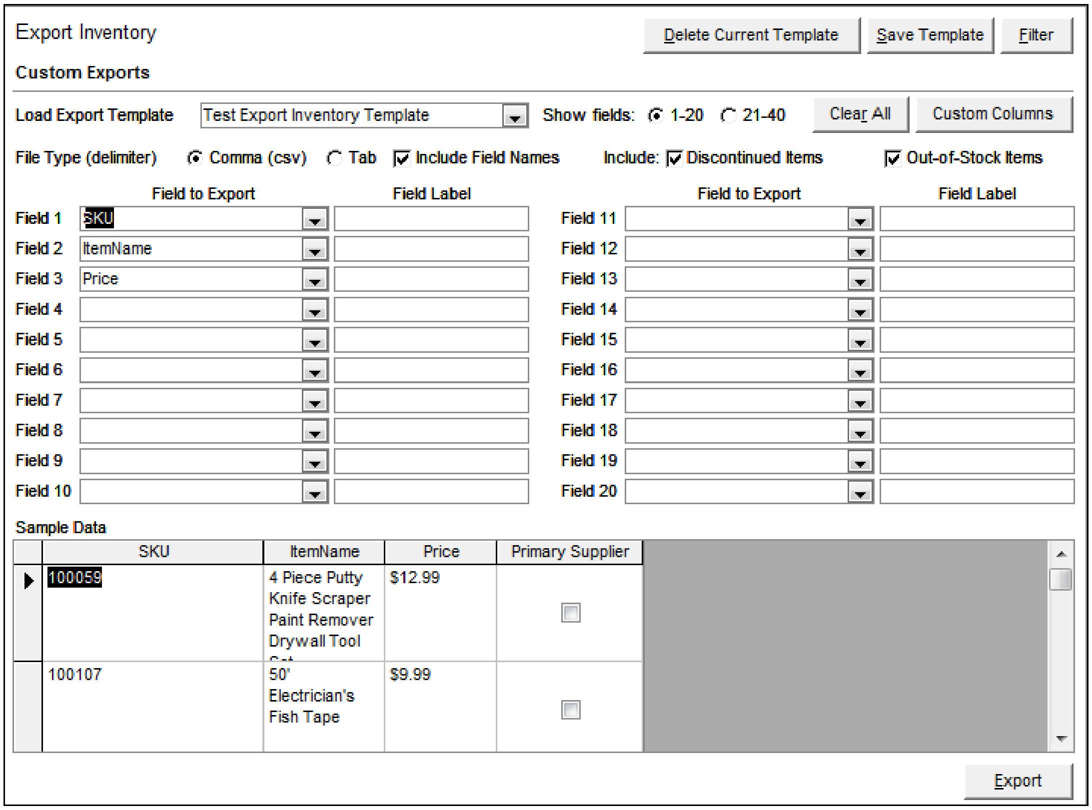
4. When all new inventory items have been scanned or entered, click the **Save** button to post the data and add the items to the quantities on hand in the store’s inventory.

Exporting Inventory

The Stone Edge Order Manager can export product data to a text file for use with other applications, including shopping carts. Select only the fields and products to be exported, or create an export "template" that can be re-used on future occasions. The data can be exported to either a comma-delimited (.csv) or a tab-delimited (.txt) text file.

Complete the following steps to export inventory:

1. Navigate to **Main Menu > Manage My Inventory > Export My Inventory**. The system displays the **Export Inventory** window:



2. Select the **File Type** to be created: **Comma Delimited (.csv)** or **Tab Delimited (.txt)**.

Note: *The type of text file to create depends on the application that eventually uses the data. If unsure of the file types accepted by the application, consult its documentation. If the application accepts both types, follow this general guideline: If the data contains commas, apostrophes and/or quotes, use the tab-delimited format. If the data does not contain special characters, use the comma-delimited format.*

3. Select your options:

   - If the first row in the data file should contain the field names, select the **Include Field Names** check box.
   - To include discontinued items, select the **Discontinued Items** check box.
   - To include out-of-stock items, select the **Out-of-Stock Items** check box.

4. For each field that is to be included in the text file, select the field name from one of the drop-down lists under the **Field to Export** columns. As each field is added its data is displayed in the **Sample Data** pane. (When the form is first opened, it automatically displays the SKU in the first column; however that can be changed).

5. If **Include Field Names** was selected, the program uses the field names from the drop-down lists. To specify a different field name to use in the text file, enter it in the **Field Label** column. For example, there is a field in The Stone Edge Order Manager called **ActualWeight**. To include that field in the export, but call it "**Package Weight**", select the **ActualWeight** field, then type "**Package Weight**" (without the quotes) into the corresponding Field Label field.
6. Click the **Custom Column** button for directions on adding a custom column of data to the exported file:

   - Select 'Add Custom Column' from the drop-down list

   - For a blank (empty) column, just enter a label for the column under Field Label

   - To insert the same text on every row in the column:

   Under Field Label, enter a column label, then a comma, then the text

   Example: This is the Label, This is the Text

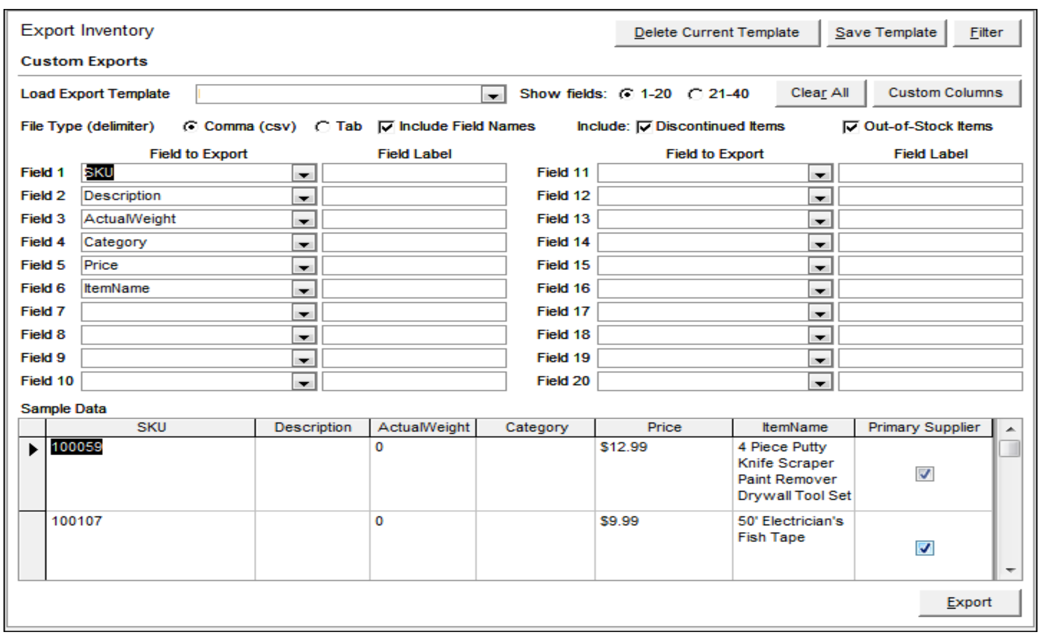
7. If only a subset of the inventory is exported, click the **Filter** button to open the **Select Items** form. After building a list of items, click **Export Selected Items** button to return to the Export Inventory form.
8. If more than twenty fields are to be exported, click the button labeled **21-40** in the **Show fields** section of the form.
9. Click **Export**. The program prompts you to enter a location and name for the text file and the data is exported.

Creating an Export Template

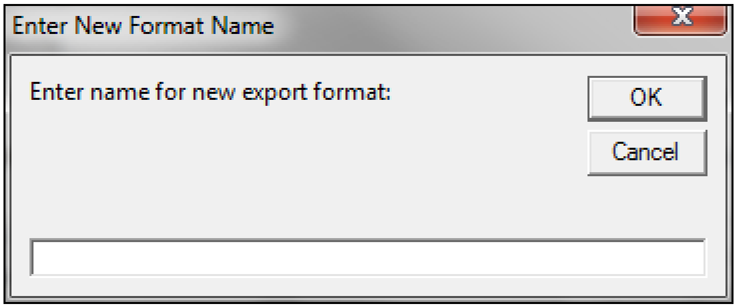
If data is frequently exported to text files, set up one or more export format "templates" which can be retrieved from the **Load Export Template** drop-down list on the Export Inventory form.

Complete the following steps to create an export template:

1. Navigate to **Main Menu > Manage My Inventory > Export Inventory** window appears.



2. Select the fields to be exported, and then click **Save Template**.
3. Enter a name for the new template and click **OK**.



4. If a template with that name already exists in the system, the program prompts you to save it under a different name or overwrite it.
5. The new template appears in the **Load Export Template** drop-down list.
6. To delete a template, select it from the **Load Export Template** drop-down list and then click the **Delete Current Template** button.

4 Managing Suppliers and Purchase Orders

The Stone Edge Order Manager manages both regular and drop-ship suppliers. Regular suppliers are those vendors from whom inventory is purchased and stocked, while drop-ship suppliers receive orders from a merchant and ship the products directly to the merchant's customer.

The Stone Edge Order Manager can also manage purchase orders (POs) for both stocked or drop-ship products. POs can be automatically created when products are needed according to the merchant's pre-defined criteria, or they can be created manually, for one or more suppliers. This chapter is divided into the following sections:

Managing Suppliers

Creating Purchase Orders

Managing Purchase Orders

Managing Suppliers

"Suppliers" are the companies you purchase products for resale to customers. Regular suppliers ship the items to the merchant who in turn ships them to the customer. Drop-Ship suppliers send products directly to the merchant's customers rather than the merchant filling the order from their own stock.

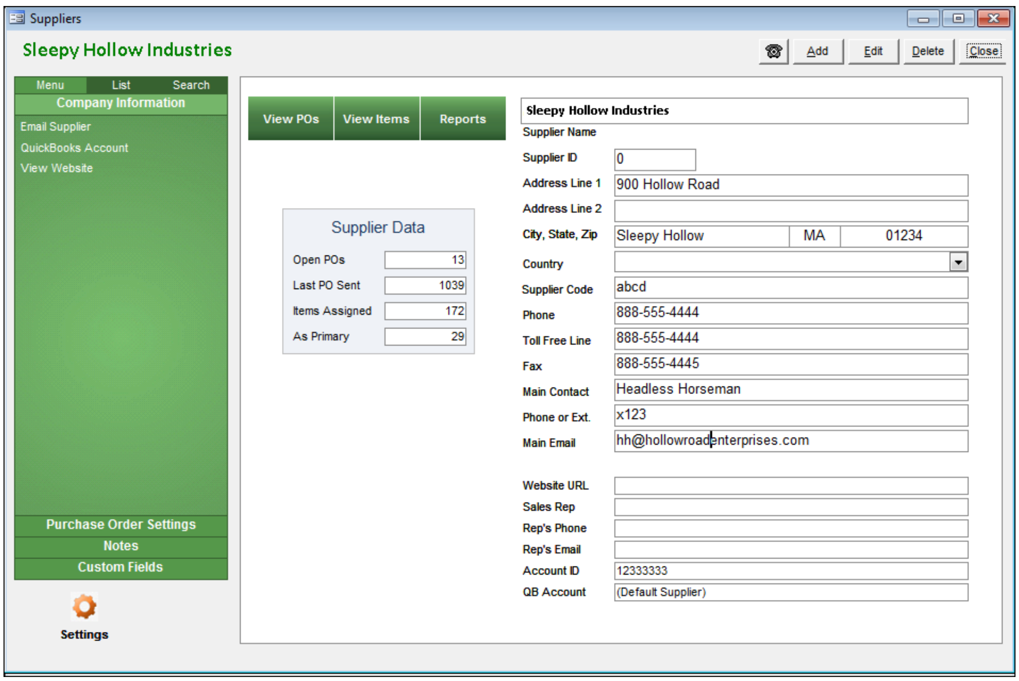
By entering supplier information into The Stone Edge Order Manager, it is possible to generate and track purchase orders as well as the cost of goods.

The **Suppliers** screen is where supplier records can be added, edited, searched, or deleted. You can also call or send an email to the supplier by using the buttons in the upper right-hand side of the form. The types of information contained in the Supplier record are: the company and contact names, physical address and email information, as well as purchase order options and notes for each supplier.

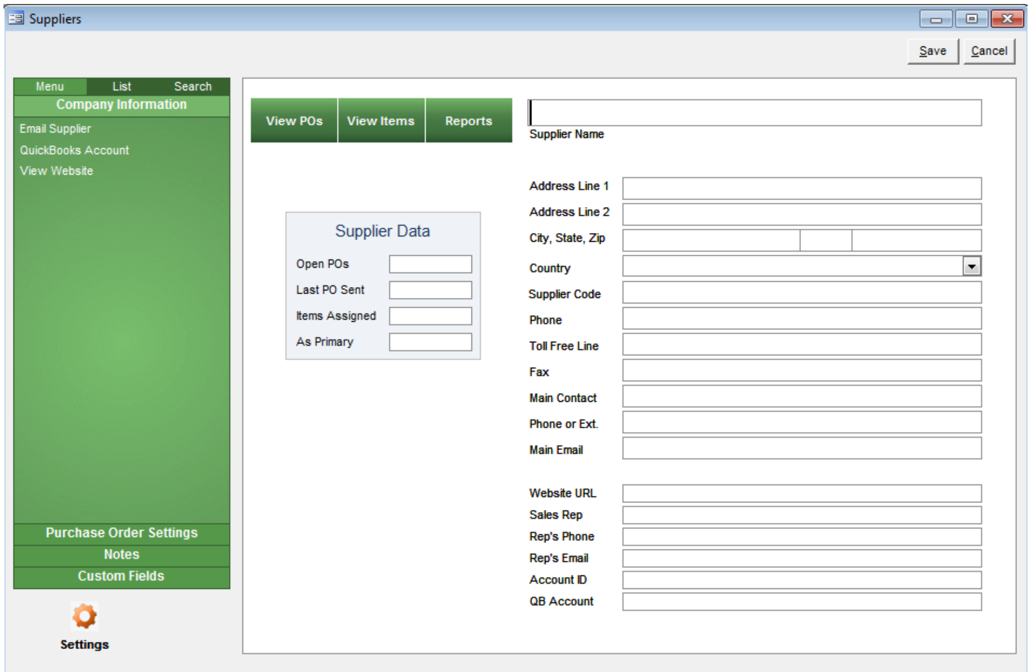
***Note**: Supplier information can also be imported from a text file or Microsoft Access database.*

Complete the following steps to manually create suppliers:

1. Go to **Main Menu > Manage My Inventory > Manage My Suppliers**.



2. Click the **Add** button.



3. Fill in information about that supplier on each of the tabs: Company Information, Purchase Order Settings and Notes
4. Click the **Save** button.

***Note**: It is important to complete as much information as possible because the program uses this information to mail, fax, or email purchase orders to the supplier.*

To edit an existing supplier record:

1. Open the Suppliers screen. Once supplier records have been defined in The Stone Edge Order Manager, a particular supplier record can be selected by using the navigation buttons at the bottom left-hand side of the screen or by clicking the **Search** button and entering search criteria. Simple wildcard searches are permitted in all fields except the Supplier Code field.

2. To edit the supplier record, click the **Edit** button, make the required changes to the record and click the **Save** button.

To delete a supplier record:

1. Navigate to the desired supplier record.
2. Click the **Delete** button. There is no “un-do” button, so be careful when deleting suppliers. If making a large number of changes, backup the data file prior to deleting records. Refer to Chapter 2, *Backing Up the Data Base, for more information.*

To have the computer dial the supplier’s telephone number:

1. Navigate to the desired supplier record.
2. Click one of the phone number fields (Phone, Toll Free Phone), then click the Dial button . This feature must be correctly configured in both Windows and The Stone Edge Order Manager before it works. Stone Edge’s system parameter **ShowPhoneButtons** must be set to TRUE before the phone button is visible in the upper right hand corner of the screen. Refer to the Knowledge Base article entitled, *Dialing a Telephone with The Stone Edge Order Manager*.

To send an email to a supplier:

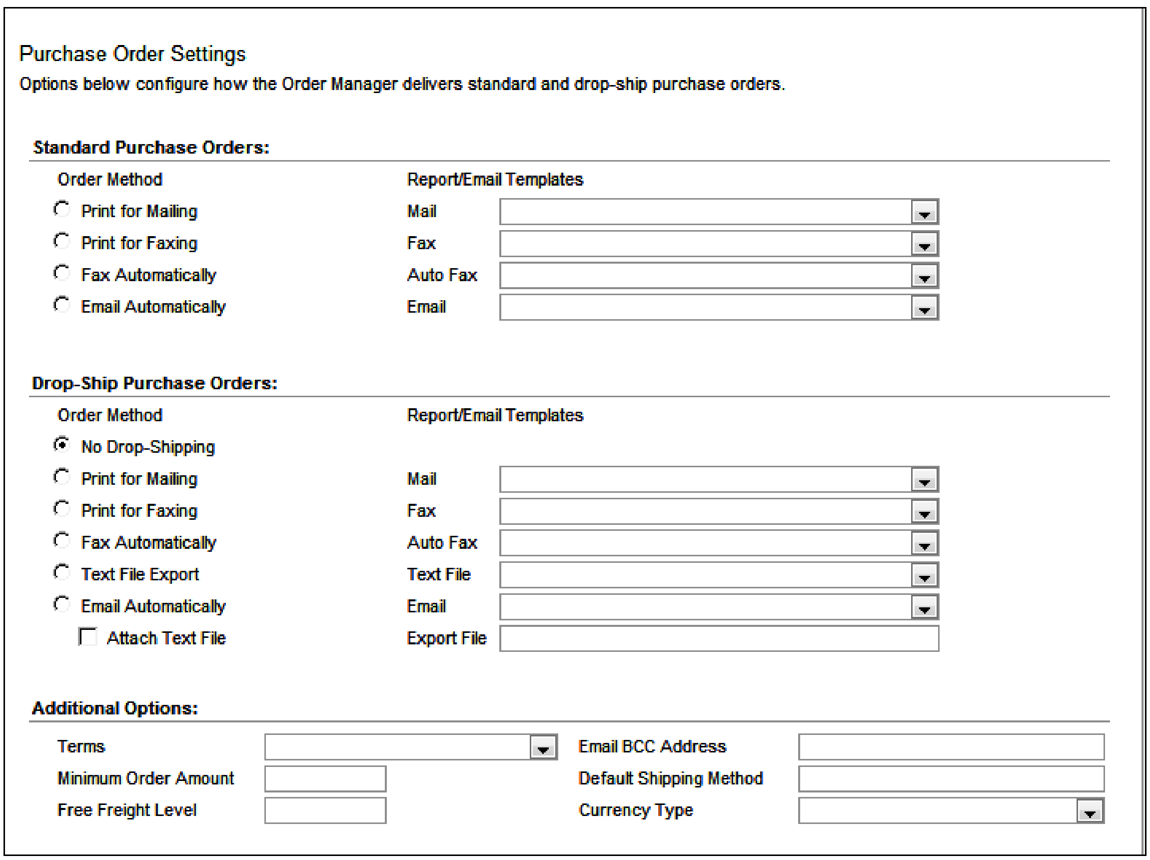
1. Navigate to the desired supplier record.
2. Click the **Email Supplier** link on the Company Information tab manually send an email message to the supplier.
3. Select an email template from the drop-down. It is possible to edit the text of the message template before it is sent by clicking the **Edit Message**. Users can also create their own custom email templates. Refer to *Email Templates,* found in Chapter 2 of this document.
4. Click the **Send** button.
5. Click the **Close** button to exit the **Suppliers** window.

Company Information Tab

The **Company Information** tab contains pertinent information about a supplier. Purchase orders are sent using this information, and therefore it is important that this information is complete and accurate. Click the **Edit** button at the top of the Supplier screen to change any information on this tab. Click the **Save** button when the changes are complete. The company's website can be viewed by clicking the **View Website** link in the accordion and the **Website URL** field is filled in.

Purchase Order Settings Tab

The **Purchase Order Settings** tab displays information about how purchase orders are handled for each supplier.



Order Methods for Suppliers

The Stone Edge Order Manager can send regular and drop-ship purchase orders to suppliers via **mail**, **email**, or **fax**. Drop-ship POs can also be sent via text files. Select a report template for the type of method that will be used to send order information to each supplier. Regular and drop-ship purchase orders each have their own settings at this screen. An explanation each of the settings follows:

Print for Mailing – Use this option to manually print regular purchase orders or drop-ship purchase orders. A hard-copy is printed for mailing.

Print for Faxing – Use this option to manually print regular purchase orders or drop-ship purchase orders. A hard-copy is printed for faxing.

Fax Automatically – The Stone Edge Order Manager is capable of sending purchase orders and drop-ship purchase orders via fax automatically using Windows Fax. See Microsoft Window's Help to configure Windows Fax on each machine that will be used to send faxes to suppliers. Refer to ***Setting up a Supplier to Fax Orders Automatically*** below.

Email Automatically – Use this option to send an email automatically. Also refer to ***Setting up a Supplier to Email Orders Automatically*** below.

Text file export – (Only available for drop-ship orders) use this option to create a text file with drop-ship order information. Each supplier should have a separate export text file (**Export File**) where the purchase order data is written.

If multiple suppliers accept order data in the same format, they may share a **Text File** template. Otherwise, create a unique text file template according to each supplier's requirements.

Attach Text File – (Only available for drop-ship orders) check this box to have the text file named in the **Export File** field below attached to the purchase order email that is sent to the supplier.

No Drop-Shipping – Select this radio button to identify suppliers that cannot be used to drop-ship items.

Report/Email Templates

System Parameters designate default templates for each type of Order Method (mail, fax, email) which are used when sending purchase orders to a supplier. You do not need to take any action regarding these parameters unless a custom template is used for certain suppliers. To override the program's default template settings, open the Supplier window, Purchase Order Settings tab and choose the custom template from the drop-down box for that supplier's Order Method. See Chapter 2 for more information on creating custom reports or email templates.

Additional Options

The **Terms** area of the **Purchase Order Options** tab is where you can specify the payment "terms" for purchase orders created by The Stone Edge Order Manager for the selected supplier.

Terms – Select the terms that apply to this supplier. The list of terms can be entered and edited at the **List Maintenance** screen (**Main Menu > Settings > Data Functions > List Maintenance > Payment Terms**). See the section entitled, *List Maintenance,* in Chapter 2 for more information.

Minimum Order Amount – Set a minimum order amount. The Stone Edge Order Manager warns you if a purchase order total is less than this amount.

Free Freight Level – This field tells The Stone Edge Order Manager the level at which the supplier provides free freight for purchase orders.

Email BCC Address – Enter an email address to receive a copy of all purchase orders emailed to the supplier.

Default Shipping Method – Enter the default shipping method for orders coming from this supplier.

Currency Type – Select a currency type from the drop-down list to use for purchase orders sent to this supplier.

Setting up a Supplier to Print Purchase Orders for Mailing

Complete the following steps to print purchase orders for mailing:

1. Open the Suppliers screen by navigating to **Main Menu > Manage My Inventory > Manage My Suppliers**. It may also be accessible via the Quick Clicks on the Main Menu.
2. Use the **Search** button or navigate to the appropriate supplier record by using the directional arrows at the bottom of the page.
3. Click the **Edit** button.
4. Select the Purchase Order Settings tab.
5. Select **Print for Mailing** as the Order Method.
6. If a custom template was created for this supplier, select it from the Report/Email Templates Mail drop-down list. Otherwise, leave this field blank and the program uses the default template reports, **PO – Standard** for regular purchase orders, and **Drop Ship – Mail** for mailing drop ship purchase orders..
7. Click **Save**. When a purchase order is created for the supplier , it is sent to the default printer of the PC that generated the purchase order.

   To send the report to a different printer, it is possible to edit the report template's Page Setup information to direct the output to a specific printer. Refer to Microsoft Access' Help for directions on altering a report to direct output to a specific printer, or see the Knowledge Base article entitled, *Set Report Specific Printer Settings (search for specific printer).* Save the altered report with a new name in the current program file and also save it in the Custom Reports database. Import the new custom report into the program file on each workstation as needed. See the section entitled *Custom Report Maintenance,* in Chapter 2 of this document for more details.

Setting up a Supplier to Fax Purchase Orders

Complete the following steps to fax purchase orders to a supplier:

1. Open the Suppliers screen by navigating to **Main Menu > Manage My Inventory > Manage My Suppliers**. It may also be accessible via the Quick Clicks on the Main Menu.
2. Use the **Search** button or navigate to the appropriate supplier record by using the directional arrows at the bottom of the page.
3. Click the **Edit** button.
4. Select the **Purchase Order Settings** tab.
5. If a custom purchase order template was created for the supplier, select it from the **Templates** drop-down box next to the desired Order Method on the Purchase Order Settings tab. Otherwise, leave this field blank and the system will use the default templates for the chosen Order Method. For regular purchase orders, the Order Method **Print for Faxing** uses the **PO – Standard** template and the **Fax Automatically** method uses the **PO – Auto Fax** template. Drop-ship purchase orders **Print for Faxing** method uses the **Drop Ship – Manual Fax** template and the **Fax Automatically** method uses the **Drop Ship – Auto Fax** template by default.
6. Click **Save**. When a purchase order is generated for the supplier, it is process according to the supplier-specific settings.

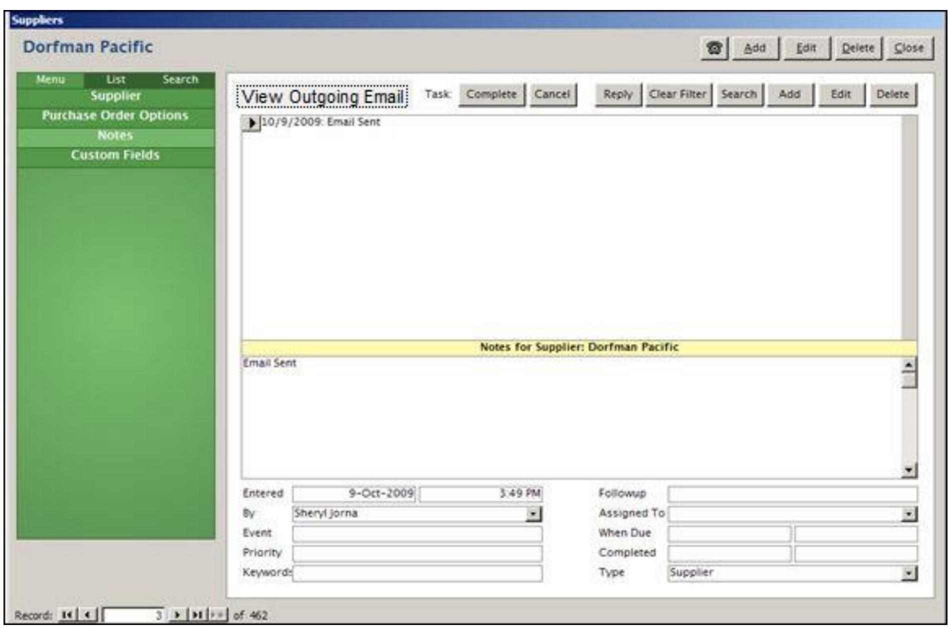
Setting up a Supplier to Email Purchase Orders Automatically

Complete the following steps to automatically email purchase orders to a supplier:

1. Open the Suppliers screen by navigating to **Main Menu > Manage My Inventory > Manage My Suppliers**. It may also be accessible via the Quick Clicks on the Main Menu.
2. Use the **Search** button or navigate to the appropriate supplier record by using the directional arrows at the bottom of the page.
3. Click the **Edit** button.
4. Select the Purchase Order Settings tab.
5. Select **Email Automatically** as the Order Method in the standard and/or drop shipping section of the Purchase Order Settings tab of the supplier record.
6. If a custom template has been created for this supplier, select it from the Templates drop-down box next to the Order Method (Email**).** Otherwise, leave this field blank and the program uses the default email template reports, **PO – Email** or **Drop Ship – Email**.
7. If sending a text file by email (drop-ship PO's only), select the **Attach Text File** box to have the file specified in the **Export file** field attached to the email sent automatically to the supplier. System parameter **EmailSendMethod** must be set to **Order Manager** to use this feature. There must be an email address entered into the **Main Email** field on the Company Information tab of the supplier record for this option to work.
8. Click **Save**.

Notes Tab

The **Notes** tab shows all of the existing notes and tasks associated with the supplier record. Use the buttons on the form to add, edit, search or respond to existing notes. Refer to ***Checking Notes and Tasks***, in Chapter 2, for more information.



Working with Supplier Notes and Tasks

Complete the following steps to view, add, or edit notes to a supplier record:

1. Open the Suppliers screen by navigating to **Main Menu > Manage My Inventory > Manage My Suppliers**. It may also be accessible via the Quick Clicks on the Main Menu.
2. Use the **Search** button or navigate to the appropriate supplier record by using the directional arrows at the bottom of the page.
3. Click the **Edit** button.
4. Select the **Notes** tab.
5. All of the notes associated with the supplier record are listed. Select a particular note and the details are displayed at the bottom of the screen.
6. Use the buttons on the **Notes** tab to **Add**, **Edit**, **Search** or **Reply** to notes. Notes can also be marked as completed or canceled, by clicking the **Complete** or **Cancel** buttons.
7. Click the **View Outgoing Email** button to see emails sent to the supplier. System Parameter **AddEmailToNotes** must be set equal to TRUE for emails to be saved in the body of a Note. The **Delete** button is not visible unless system parameter **AllowDeleteNotes** is set to TRUE. Refer to ***Checking Notes and Tasks***, in Chapter 2, for more detailed information about using the Notes feature.

Custom Tab

The **Custom** tab is only visible when you have defined custom supplier fields. See the Knowledge Base topic, *Configuring Custom Fields* for more information.

Creating Purchase Orders

The Stone Edge Order Manager can create purchase orders (POs) for re-stocking purposes. Use The Stone Edge Order Manager to log new inventory when it is received, and enter invoices from vendors. Create POs automatically or manually. If POs are created manually, it is possible to either select items individually or use the multi-select tool to select multiple items quickly.

Refer to the following sections for more information on the various methods of creating POs:

Creating POs Automatically

Creating POs from Individual Items

Creating POs Using Multi-Select

Purchasing Lots

Creating POs Automatically

The Stone Edge Order Manager can create new purchase orders automatically for a single supplier or all suppliers. If you select **All Suppliers** on the Purchase Order form**,** the program creates a separate PO for each supplier. The program displays the items and quantities to be ordered, based on information that has been specified in supplier and product records. The results can be reviewed and modified prior to the purchase order actually being created (saved) and sent to the supplier.

The automatic PO generation only works for products that have a “primary supplier” established in The Stone Edge Order Manager. Products with no primary supplier can only be added to purchase orders manually.

The program reviews the following factors for each product:

- Quantity on Hand
- Quantity needed for any un-filled orders

- Quantity already ordered from your suppliers, but not yet received
- Minimum order quantity and other purchasing rules

PO Calculation Method Parameter

The way that The Stone Edge Order Manager automatically calculates the **Items** and **Quantity to Order** for the POs it generates is controlled by the **POCalcMethod** system parameter. There are three possible settings for this parameter:

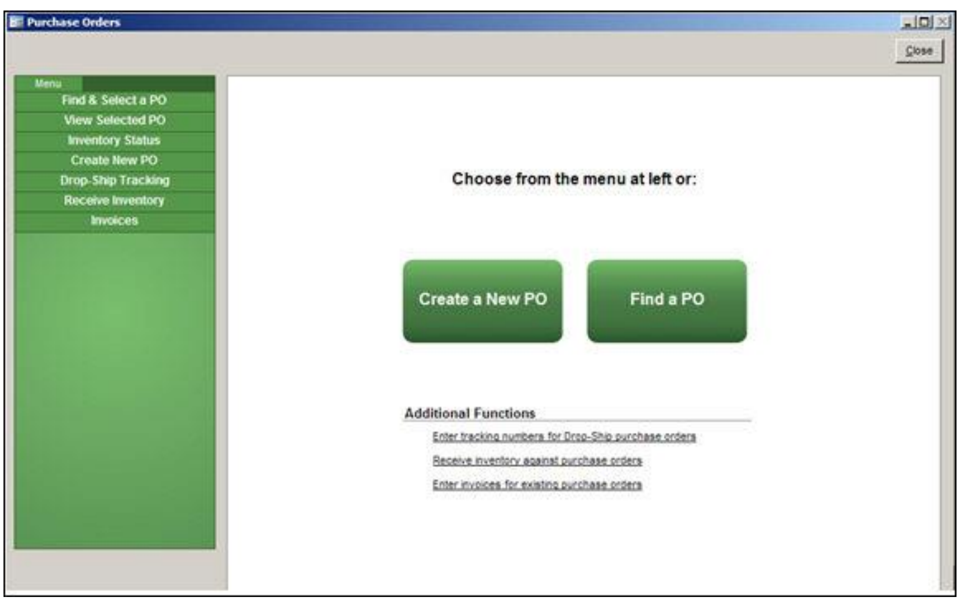
Setting	Calculation	Effects on Inventory Screen Fields
Order Quantity	If Qty on Hand + Qty on Order – Qty Needed for un-filled orders is less than or equal to its Reorder Point, order the greater of (Qty Needed – Qty on Hand – Qty on Order) or the Reorder Qty.	The I**tem** tab of the Inventory screen displays **# On Hand** and **Reorder Pt** and **Reorder Qty**. fields.
Target Quantity	If the Quantity on Hand + Quantity on Order – Quantity Needed for un-filled orders is less than the Target Quantity, order enough to get back to the Target Quantity.	The I**tem** tab of the Inventory screen displays **# On Hand** and **Target Qty**. fields.
Delayed Target	Wait until the Quantity on Hand + Quantity on Order – Quantity Needed for un-filled orders is less than or equal to the Reorder Point, then order enough to get back to the Target Quantity.	The I**tem** tab of the Inventory screen displays **# On Hand** and **Target Qty**. and **Reorder Point** fields.

To set the parameter according to the business needs, go to **Quick Clicks > System Parameters**. In the **Parameter Group** box, select **Purchase Orders**. Select **POCalcMethod** from the **Parameters in Selected Group** box.

Regardless of which method is chosen, the **Create POs Automatically** function on the Purchase Orders screen allows you to edit and add items to the automatically generated purchase orders prior to sending them.

Complete the following steps to automatically create a purchase order:

1. Go to the **Main Menu > Manage My Inventory > Manage My Purchase Orders** or it may also be available in the Quick Clicks list on the Main menu, provided you have not altered the default settings.
2. Click **Create New POs** tab or button.



3. The **Create POs Automatically** button is selected by default.
4. Select how you would like to create your PO: **Automatically**, **Manually by item** or **Manually from list.** Then select additional options:

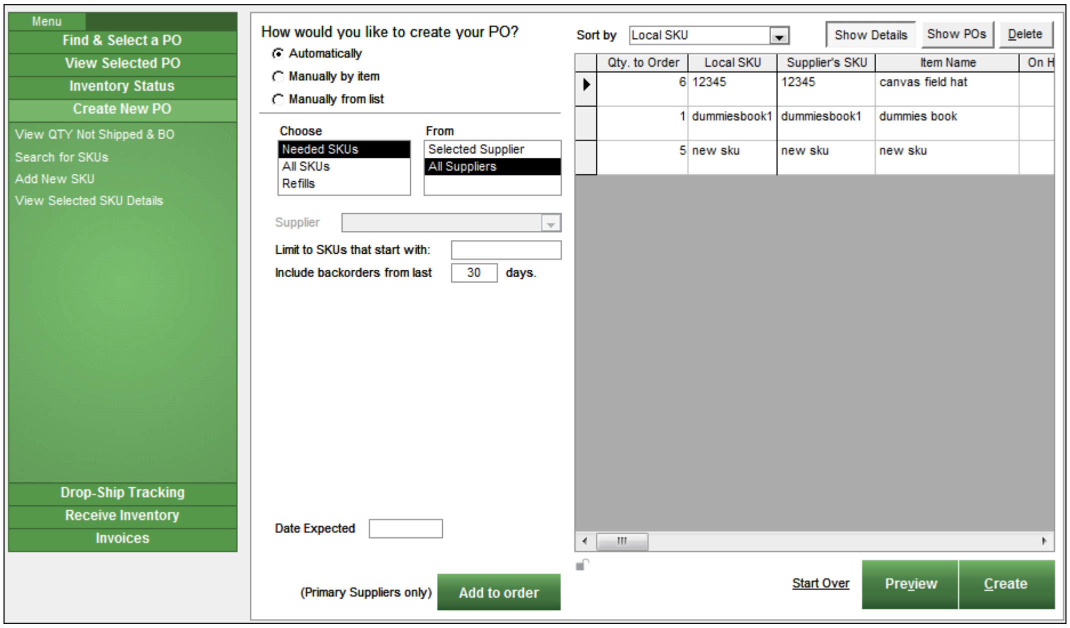
Item Ordering Option	**Result**
Needed SKUs	Only purchase items supplied by this vendor that require reordering based on the setting of the system parameter **POCalcMethod**.
All SKUs	Order all inventory items that are purchased from this supplier in the specified **Reorder Quantity** for each item.
Refills	Order items from this supplier based on historical sales data. For example (underlined values are sample numbers): If there is less than a 30 day supply, bring the QOH up to a 60 day supply. Base the sales on the last 30 days OR on sales from May 1, 2009 thru May 31, 2009. The Stone Edge Order Manager calculates the average number of items that sold per day in that period. You can then order an **X**-day supply based on that rate.

5. Select the suppliers for which purchase orders are created:

Supplier Option	**Result**
Selected Supplier	This creates a single purchase order for the selected supplier. Select the supplier from the drop-down list. Only items that have the chosen supplier marked as their Primary Supplier (on the item inventory record) can be added to the purchase order for the supplier.
All Suppliers	This creates a separate purchase order for each supplier from which products need to be ordered.

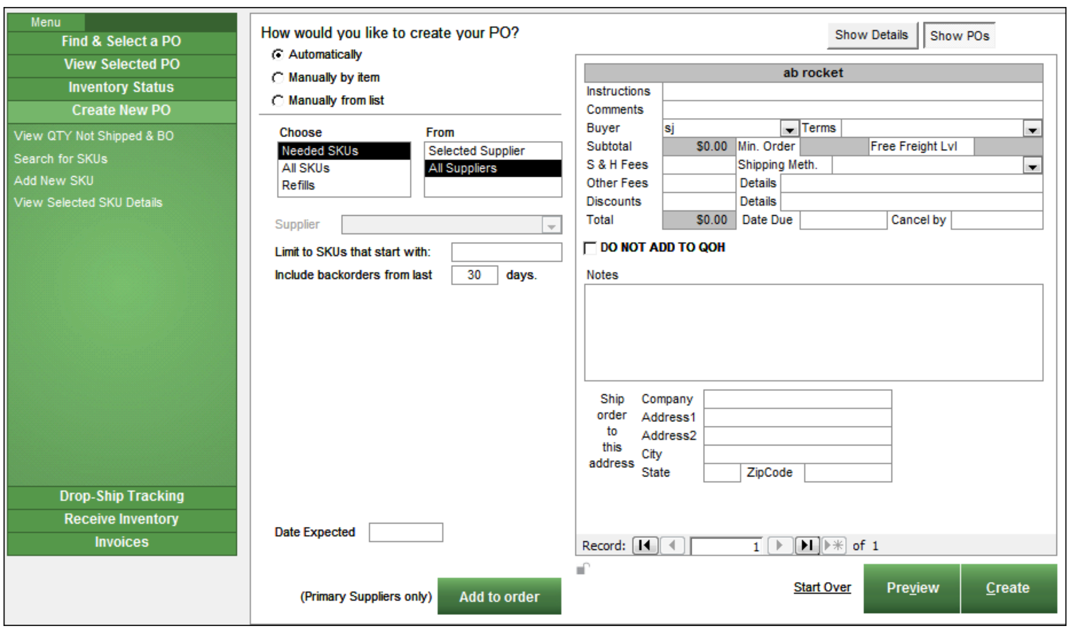
6. Optional: Enter a string of text in the **Limit to SKUs that start with** box to limit the items that will be included in the purchase order.
7. Optional: Enter a value in the **Include backorders from last ___ days** to limit how far back the program should look for backordered items.

8. Once all choices have been made, click the **ADD TO ORDER** button. The items to be ordered appear in the list to the right.



9. It is possible to edit any of the **Qty. to Order** fields, or select an item and click the **Delete** button to remove that item from the PO.

10. Click the **Show POs** button to view each PO to be created when the **Create** button is clicked. Any special instructions, comments, notes or other order details can be added to each PO from this screen as well. Use the navigation arrows at the bottom left-hand side of the screen to scroll between multiple purchase orders:



11. Select **Create** to generate the purchase order and/or send it to the supplier. The system prompts for confirmation before it sends the PO to the supplier.

Note: *The system may display a warning if any PO is below its supplier's minimum quantity or free shipping threshold. Click the* ***Yes*** *button to override the warning.*

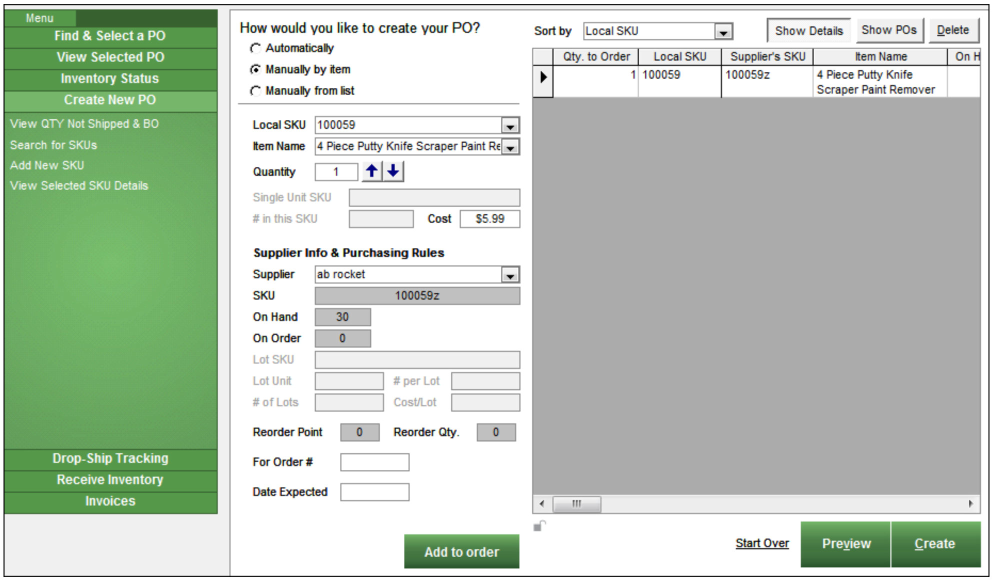
12. Click **OK**. The Stone Edge Order Manager asks if file copies should be printed.

13. Select **Yes** or **No**. Then respond **OK** to acknowledge the end of the process.

The system creates the purchase order(s) and, depending on the delivery method specified for each supplier, either prints, emails or faxes them to the suppliers.

Manually Creating POs for a Specific Item

The **Manually by item** radio button allows you to select specific items to add to a Purchase Order by selecting its **Local SKU** or **Item Name** from the drop-down boxes and clicking the **ADD TO ORDER** button. Repeat the process to order more products. Edit the value in the **Qty. to Order** field if more than one of the item is needed.



Review the purchase orders to be created by clicking the **Show POs** button. Add any special comments or instructions to the purchase order. If multiple purchase orders will be created, scroll between them by using the navigation buttons at the bottom of the list. The **Preview** button displays an electronic copy of the purchase order(s). Click the **Create** button to generate the order and/or send it to the supplier. You have the option to send the PO to the supplier and to print file copies. If you elect to send the PO to the supplier, the program uses the settings in the Supplier record to determine the delivery method in which the PO is sent (print/mail, email or fax).

Manually Creating POs for Multiple Items

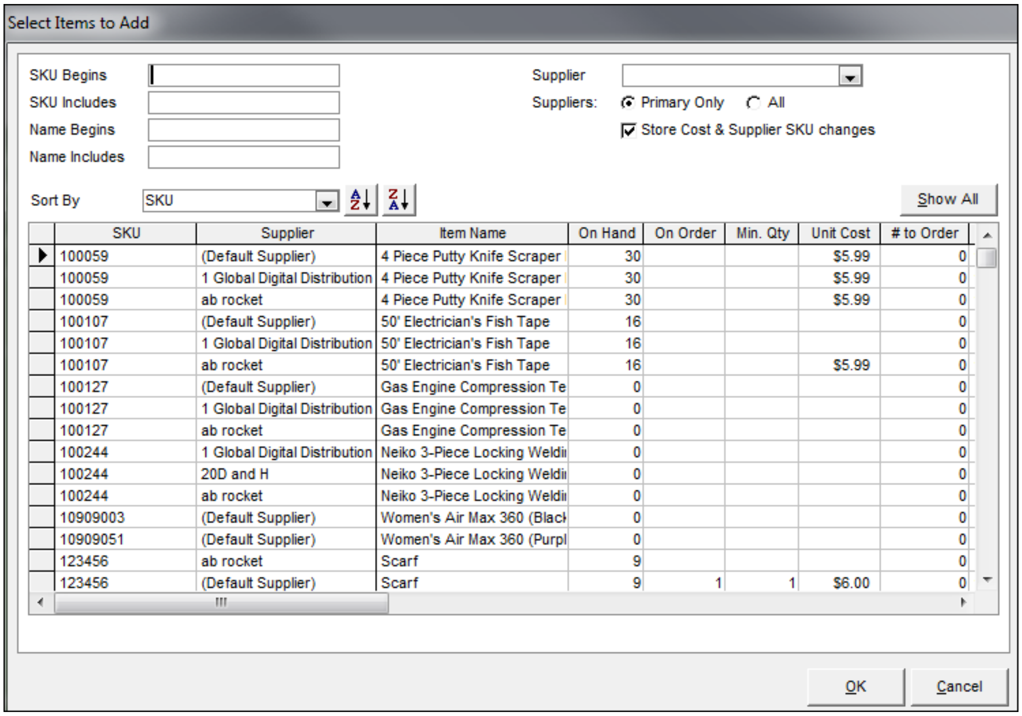
Manually from List lets you quickly add several specific items to a purchase orders at one time. Select Click **Find an item to add** and the system displays a list all inventory items:

Filter the items shown by entering criteria in the fields at the top of the screen, and press the **Enter** key to display the filtered items. Click **Show All** to view all items in the inventory.

Enter a quantity in the **# to Order** field for each item that is being ordered and click the **OK** button. The system adds the selected items in the specified quantities to the purchase order product list.

Review the items to be ordered in the list on the right and view each potential PO by clicking the **Show POs** button. Add any special instructions or comments to the purchase orders. When satisfied with the data, select the **Create** button to generate the purchase order(s). You have the option to send them to the supplier and to print file copies.

The system creates the purchase order(s) and, depending on the delivery method specified for each supplier, the program will print, email or fax them to the suppliers.



Purchasing in Lots

If there are inventory items which are purchased from a supplier as a “lot”, then those purchasing rules must be defined in the Stone Edge Order Manager supplier record <u>before</u> creating a purchase order for those items so that the program can correctly generate a purchase order and track inventory for lot items.

Note: *Lot items may have been defined when inventory was imported during setup or it may have been entered when a new inventory item was created. (See Step 5 in* ***Creating a New Item****, found in Chapter 3). For information about creating a lot from single items and/or breaking lots into single items, see* ***Transferring Inventory*** *in Chapter 3.*

Configure the Supplier’s Purchasing Rules for a Lot Item

1. Go to **Main Menu > Manage My Inventory > View and Manage My Inventory > Suppliers**. The *Inventory* screen may also be accessible from the **Quick Clicks** on the Main Menu.
2. Use the **Search** field at the top of the accordion to find an item or use the navigation arrows at the bottom left-hand side of the screen to scroll through all inventory records.

3. Click the small **Edit** button adjacent to **Supplier for this SKU** to make changes to the information on this screen.

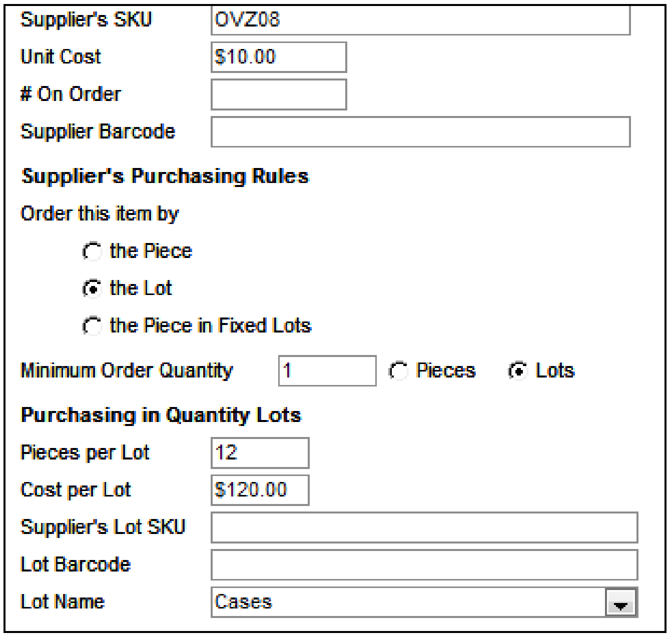


Figure 1: *Purchasing by the Lot*

In this example, a merchant sells wine by the bottle, which the vendor requires he purchase by the Lot, (i.e., case) with a minimum order quantity of 1. Should the Auto PO System determine that you need to order 8 bottles of wine to meet his target quantity on hand, it will order a quantity of 1 lot because this SKU must be ordered in lots of 12 bottles. The Auto PO System will place one lot (1 case) on the purchase order (instead of 12 bottles) because this SKU is ordered "by the Lot."

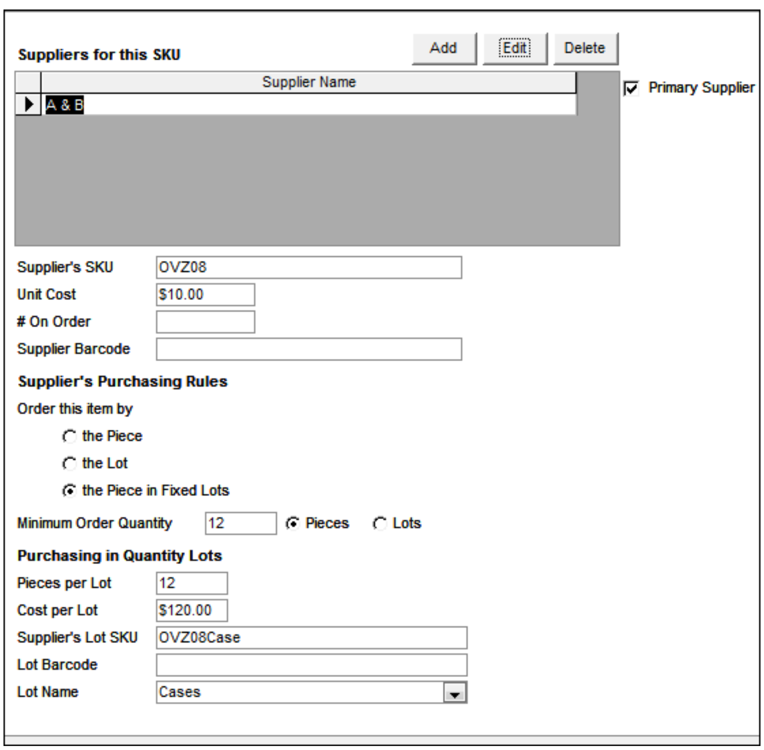


Figure 2: Purchasing by the Piece in fixed Lots

In this example, the merchant sells wine by the bottle, which he must purchase by the Piece in fixed Lots (i.e. cases). Should the Auto PO System determine that the merchant needs to order 8 bottles of wine to meet his target quantity on hand, it will increase the order quantity to 12 units because this SKU must be ordered in fixed lots of 12 bottles. The Auto PO System will place 12 units on the purchase order (instead of 1 lot or case) because this SKU is ordered "by the Piece in fixed Lots."

4. Enter the **Supplier's Purchasing Rules** to specify how items are purchased from the supplier.
    a. Choose **by the Piece** (default setting), **by the Lot**, or **by the Piece in fixed Lots** (the latter is not typical). The difference between purchasing in "lots" and "by the piece in fixed lots" is how the merchant, or the vendor, wants the line item to display on the purchase order – by the number of units (singles) or the number of lots (i.e., cases).
    b. If the supplier of this item has a **Minimum Order Quantity**., enter that number in the field. If this item must be ordered by the lot, select **Lots**, otherwise leave it set to **Pieces** (default setting).
5. In the **Purchasing in Quantity Lots** box, enter the **Pieces per Lot** and **Cost per Lot**.
6. Click the **Save** button.

Creating a PO for Items Purchased in Lots

Once lot items have been defined and the supplier's purchasing rules have been set, purchase orders can be created in the same way as they are for single-SKU items: **Create POs Automatically**, **Order Individual Items**, or **Multi-Select**. See the section, *Creating Purchase Orders*, earlier in this chapter, for more information.

Managing Purchase Orders

About the Purchase Orders Screen

The **Purchase Orders** screen is used to create and view purchase orders. There are seven accordion tabs for Purchase Orders:

- **Find & Select a PO**
- **View Selected PO**
- **Inventory Status**
- **Create New PO**
- **Drop-Ship Tracking**
- **Receive Inventory**
- **Invoices**

In addition, there are two large buttons in the middle of the screen to **Create a New PO** or **Find a PO**.

You can also select **Additional Functions**, such as entering tracking numbers, receiving inventory against purchase orders, and entering invoices for existing purchase orders, directly from this main page.

Purchase Order Workflow

The general workflow for regular (restocking) purchase orders is the following: **Create a new PO > Send it to the supplier > Receive Inventory from the supplier > Enter Invoices into Stone Edge.**

The workflow for drop-ship purchase orders is the following: **Create a drop-ship PO and send to supplier > Enter or import tracking data from supplier file > Enter invoices into Stone Edge.**

Once invoices have been entered, they can be exported to QuickBooks as bills to be paid.

Unfortunately, the whole purchase order process can be cumbersome for a lot of merchants:

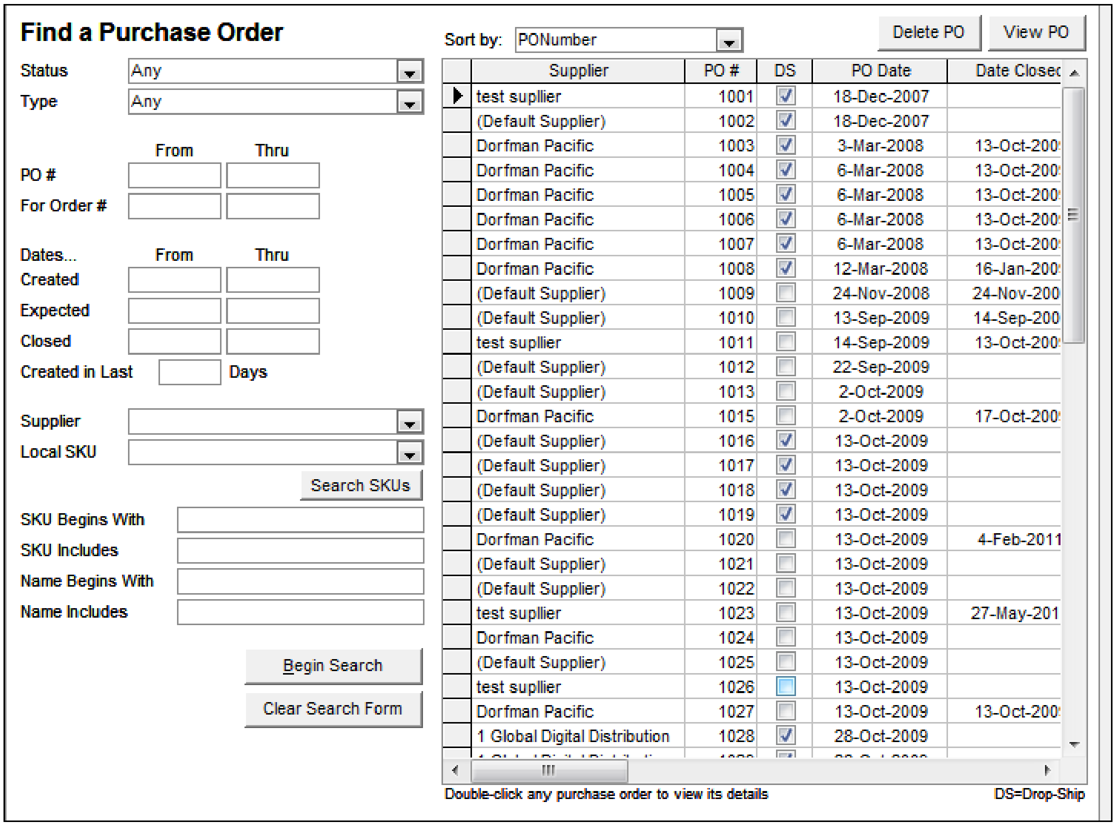
- POs may need to be changed between the time they are placed and the time they are received.
- After a purchase order is placed, you may find that the costs are different from what was expected.
- The actual products and quantities that are received may differ from what was ordered.
- Invoices may include all or portions of multiple POs.

To accommodate issues like these, The Stone Edge Order Manager uses the concept of "loosely connected data." For each purchase order, The Stone Edge Order Manager stores what was originally ordered, what is currently expected (if not already received), what is received and what has been invoiced. Each stage is "loosely connected" to the other stages, so almost anything can be changed until the items have been received and invoiced.

Find & Select a PO Tab

The **Find & Select a PO** is used to locate and select purchase orders for viewing.

Enter filtering criteria (e.g., filter by the status or type of POs, the supplier, a range of purchase order numbers, a date range, or by SKU or item name) and select **Begin Search** to product a list of purchase orders. The **Clear Search Form** button removes the filtering criteria and displays all POs.



Select a purchase order from the list and click **View PO** to see more details, such as the Line items, Expected, Received or Invoiced records.

You can also view note or take additional action related to the purchase order by selecting one of the tabs in the accordion.

Be aware that each purchase order's original details are "locked" once the purchase order has been added to a Purchase Order Invoice, however, "Expected" and "Received" information for the purchase order can still be edited.

Close POS Past Cancel By Date

This link does not open a new screen but it allows you to close purchase orders having **Expected** items which were not **Received** by the cancellation date set when the purchase order was created. It assumes you will create a purchase order for those items with another supplier

Print PO Status Report

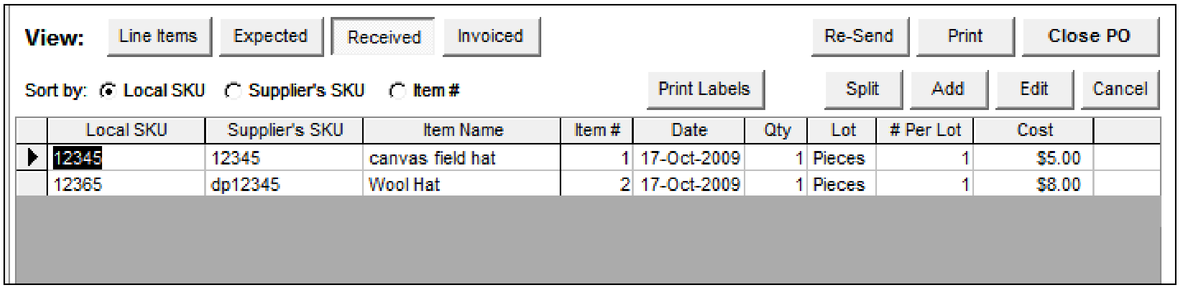
This link sends the Purchase Order Status report to the default printer or opens the printer menu if **UsePrinterMenu** is TRUE.

View Selected PO Tab

The **View Selected PO** tab of the **Purchase Order** screen contains links to view the different types of data associated with the selected purchase order.

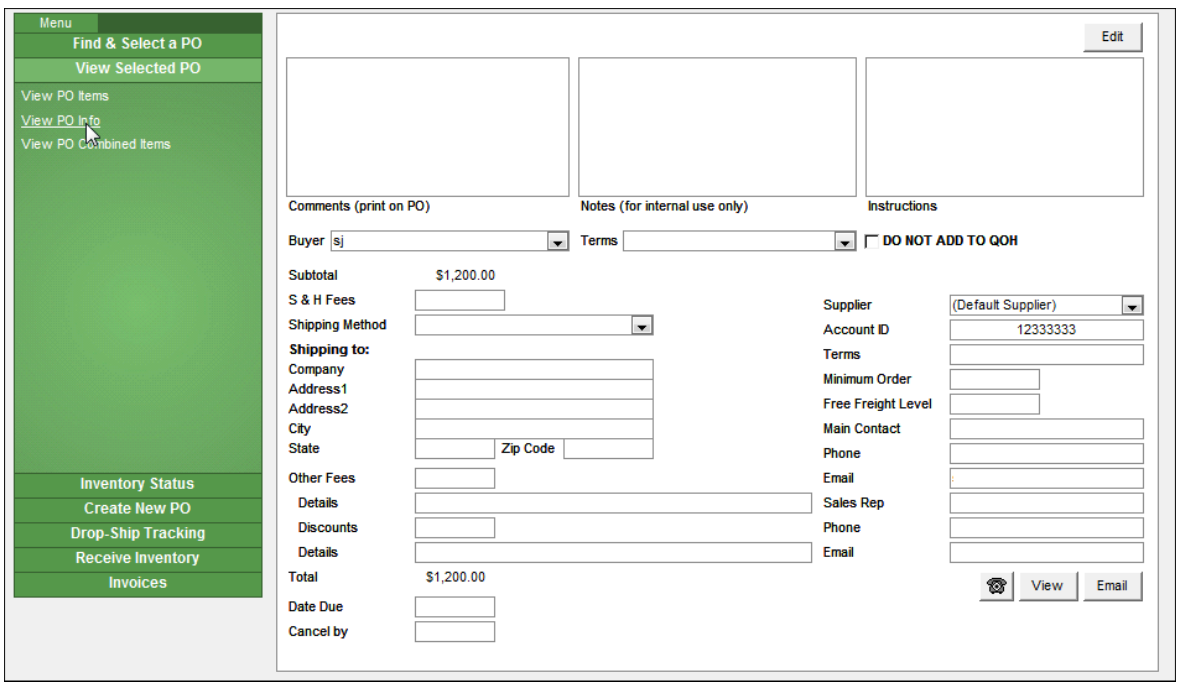
View PO Items.

Purchase order information can be edited or re-sent from this tab. Barcode labels can be printed for Received or Expected items. The expected date for all items on the PO can be set by clicking the calendar button when viewing the expected records of a PO. Purchase orders can also be closed from this tab.



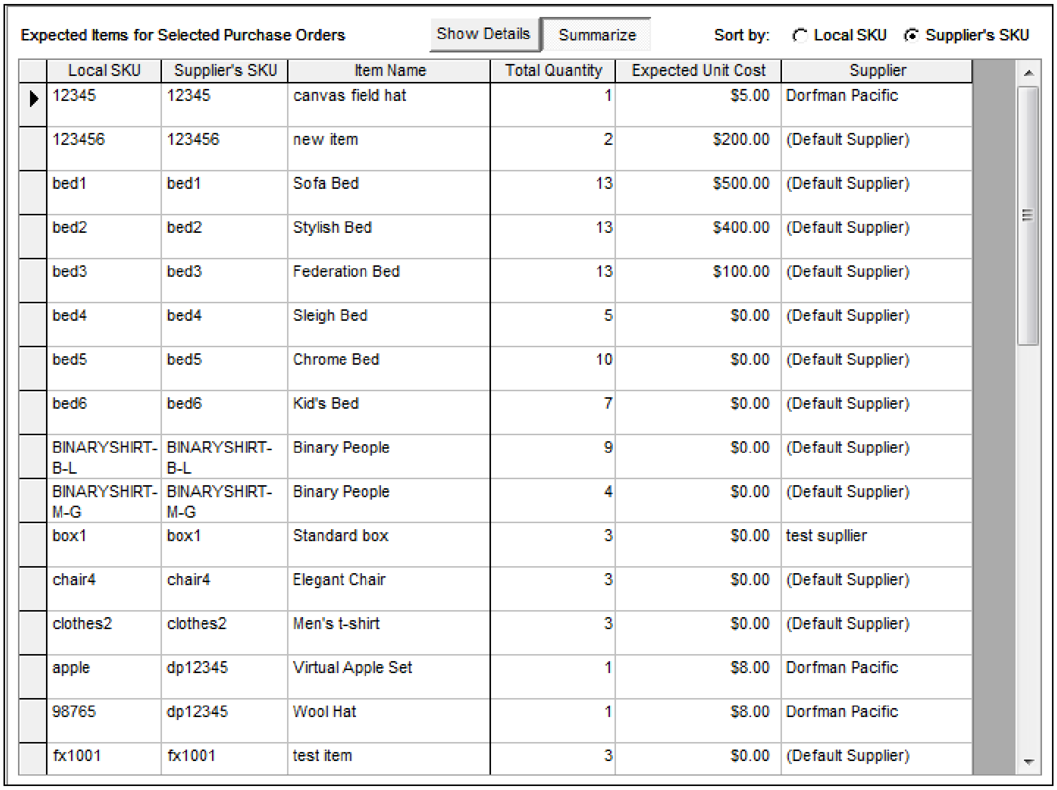
View PO Info

General purchase order and supplier information is displayed at this screen. Click the **Edit** button to make changes. To see the entire supplier record, click the **View** button. Use the **Email** button to send an email.



View PO Combined Items

This screen displays a complete list of ***all*** the expected items on ***all*** POs currently listed on the **Find & a Select PO** tab. The **Show Details** button displays each line item individually. Click the **Summarize** button to view the combined totals for each product. The lists can be sorted by **LocalSKU** or **Supplier's SKU.**



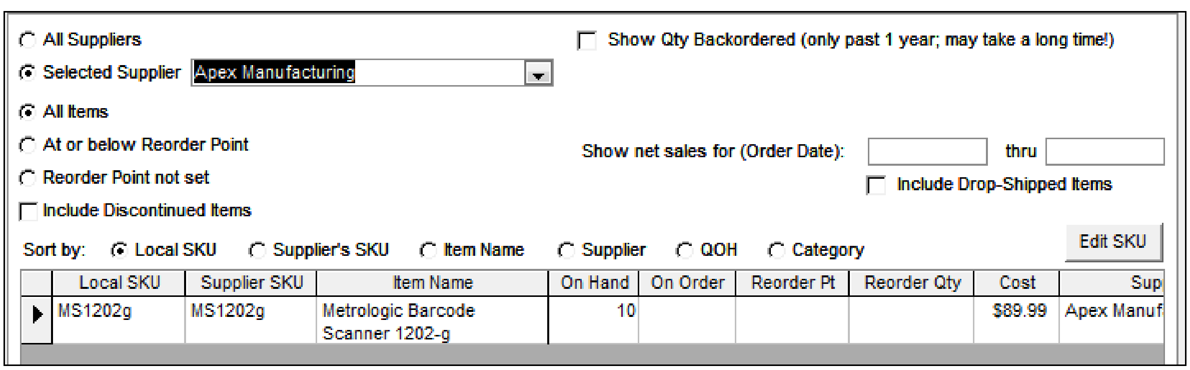
Local SKU	Supplier's SKU	Item Name	Total Quantity	Expected Unit Cost	Supplier
12345	12345	canvas field hat	1	$5.00	Dorfman Pacific
123456	123456	new item	2	$200.00	(Default Supplier)
bed1	bed1	Sofa Bed	13	$500.00	(Default Supplier)
bed2	bed2	Stylish Bed	13	$400.00	(Default Supplier)
bed3	bed3	Federation Bed	13	$100.00	(Default Supplier)
bed4	bed4	Sleigh Bed	5	$0.00	(Default Supplier)
bed5	bed5	Chrome Bed	10	$0.00	(Default Supplier)
bed6	bed6	Kid's Bed	7	$0.00	(Default Supplier)
BINARYSHIRT-B-L	BINARYSHIRT-B-L	Binary People	9	$0.00	(Default Supplier)
BINARYSHIRT-M-G	BINARYSHIRT-M-G	Binary People	4	$0.00	(Default Supplier)
box1	box1	Standard box	3	$0.00	test supllier
chair4	chair4	Elegant Chair	3	$0.00	(Default Supplier)
clothes2	clothes2	Men's t-shirt	3	$0.00	(Default Supplier)
apple	dp12345	Virtual Apple Set	1	$8.00	Dorfman Pacific
98765	dp12345	Wool Hat	1	$8.00	Dorfman Pacific
fx1001	fx1001	test item	3	$0.00	(Default Supplier)

Inventory Status Tab

The **Inventory Status** tab allows you to display current inventory information for selected items, items from s selected supplier, those that are below their reorder points, etc.

The data can be sorted by Local SKU, Supplier's SKU, Item Name, Supplier, QOH or Category.

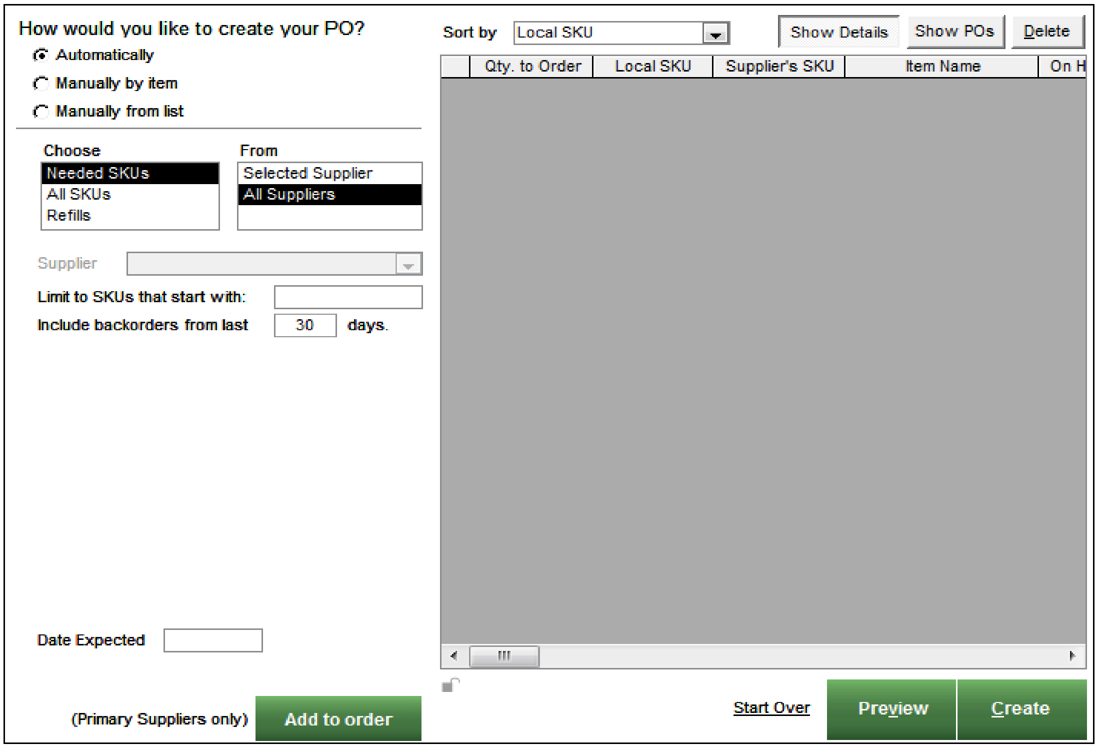
You can also make changes to selected inventory records by selecting it in the list and clicking the **Edit SKU** button.



Local SKU	Supplier SKU	Item Name	On Hand	On Order	Reorder Pt	Reorder Qty	Cost	Sup
MS1202g	MS1202g	Metrologic Barcode Scanner 1202-g	10				$89.99	Apex Manuf

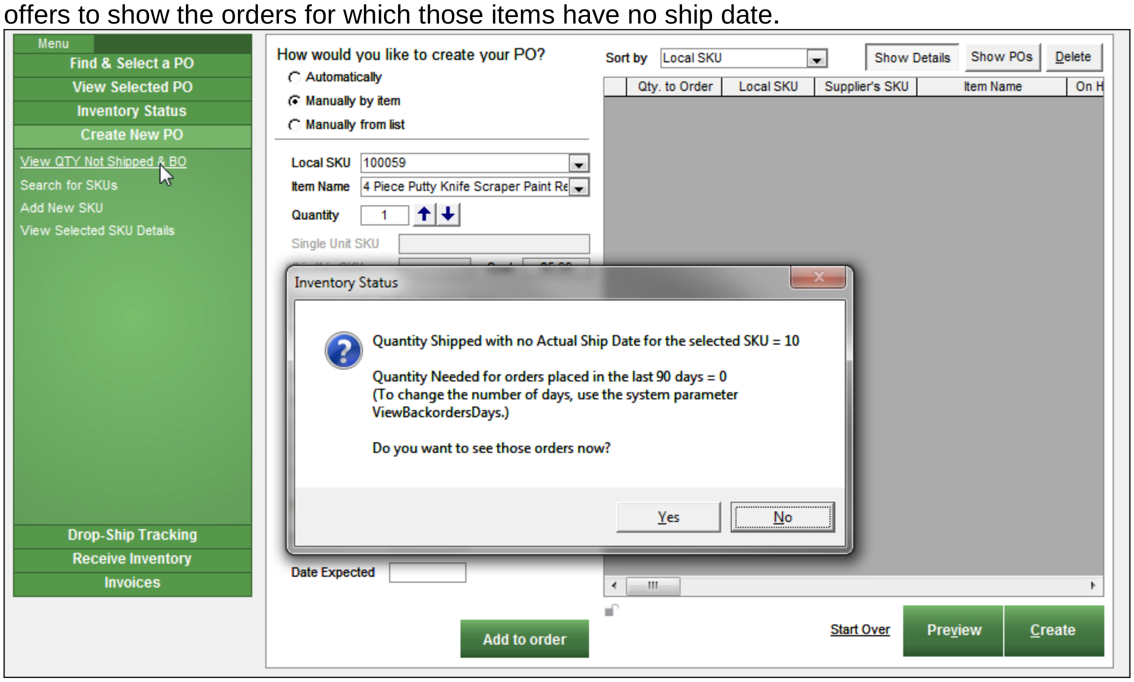
Create New PO Tab

The **Create New PO** tab provides three different methods for creating purchase orders: automatically, manually by item or manually from a list of products.



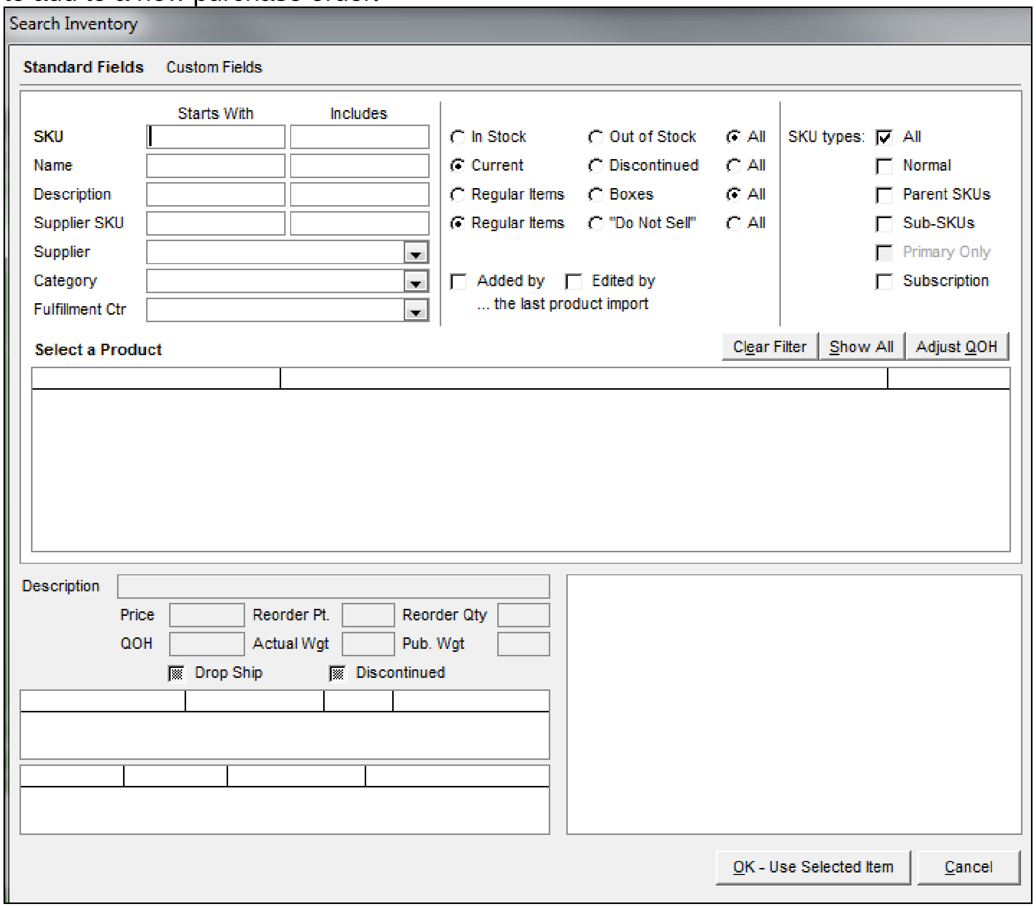
View QTY Not Shipped & BO

Select a supplier and an item and this link shows the quantity needed for a given time period, the quantity of the item marked as shipped on orders but do not have an actual ship date set. The program offers to show the orders for which those items have no ship date.



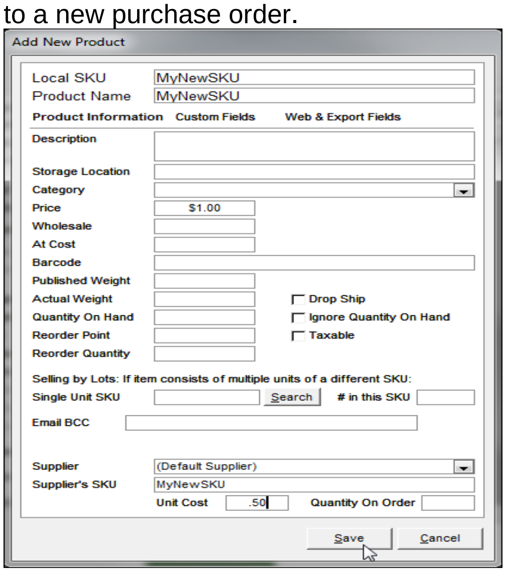
Search for SKUs

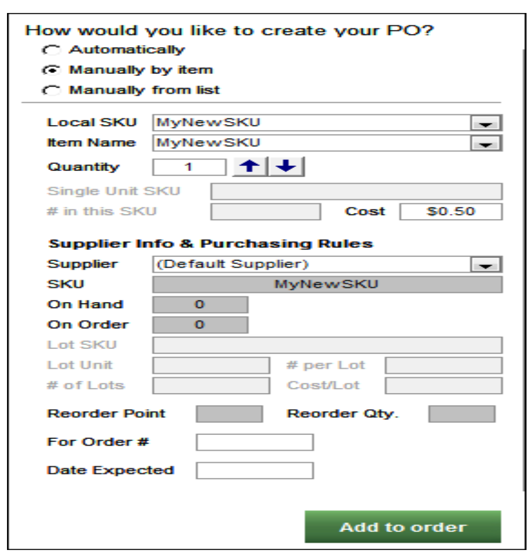
This accordion link opens the *Search* Inventory screen where you can enter criteria to search for a SKU to add to a new purchase order.



Add New SKU

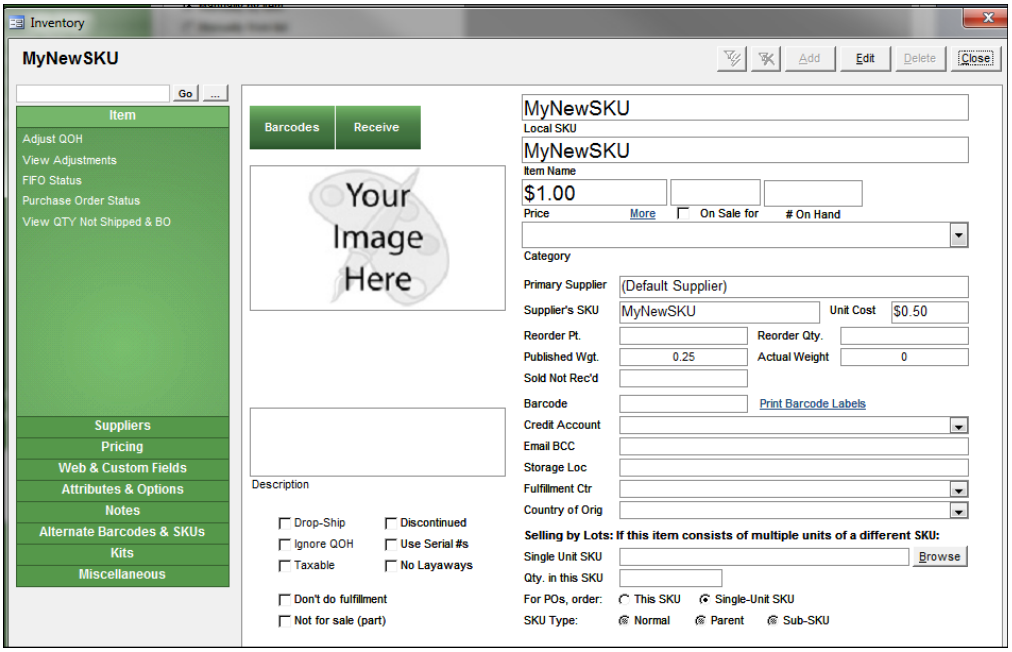
This link opens the Add New Product screen where you can add a product record on the fly and add it to a new purchase order.





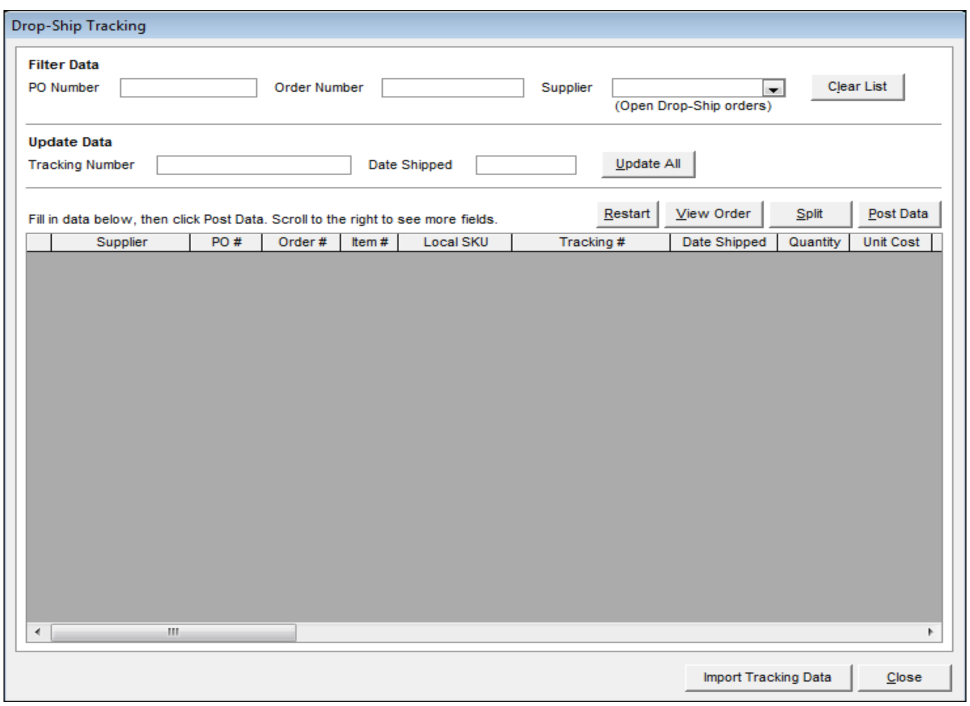
View Selected SKU Details

This link opens the selected item in the *Inventory* screen.



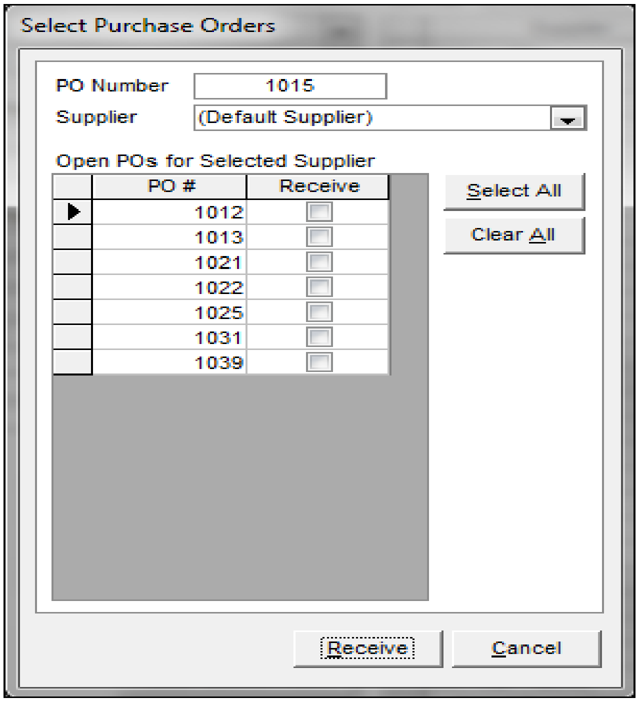
Drop-Ship Tracking Tab

The **Drop-Ship Tracking** tab includes the **Add Tracking Numbers** link which opens the Drop-Ship Tracking screen. Tracking information can be added manually for regular purchase orders or for drop-ship purchase orders, or it can be imported via a text file. When finished, click the **Post Data** button to save the data.



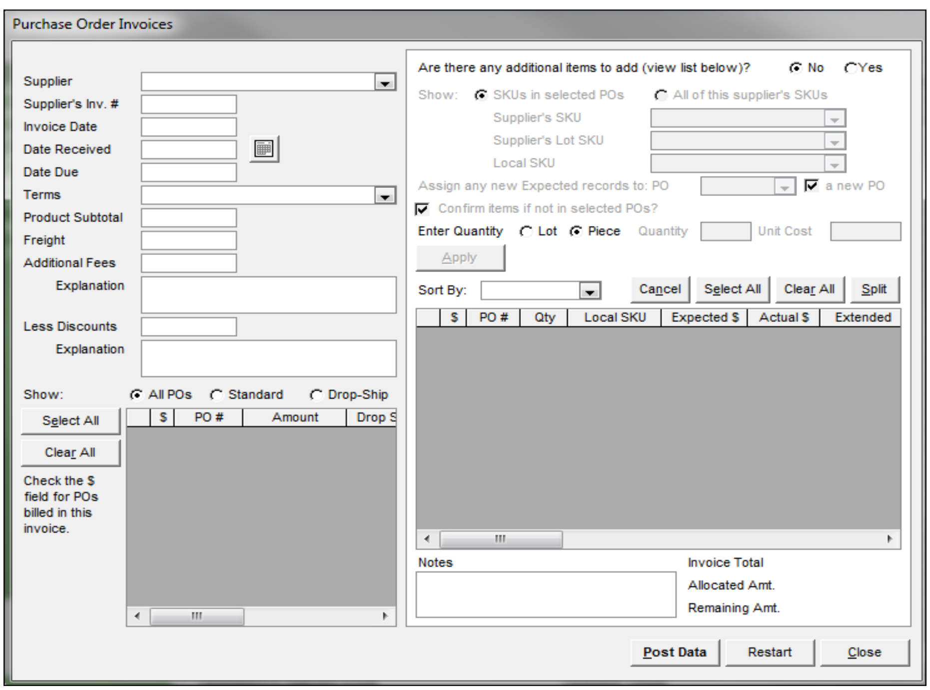
Receive Inventory Tab

The **Receive Inventory** tab includes a link to **Receive Against a Purchase Order**. It opens the *Select Purchase Orders* screen where you can select one or more purchase orders to “receive inventory:” into the database.



Invoices Tab

The **Invoices** tab includes a link to **Enter Invoices for Purchase Orders**. It opens the *Purchase Order Invoices* screen where you can add invoice information for one or more purchase orders.

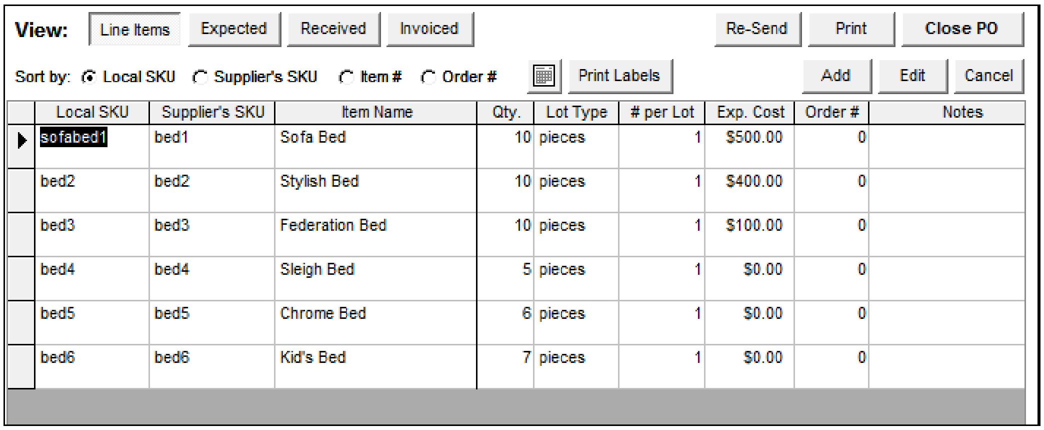


How to …

Revise a Purchase Order

Complete the following steps to find and revise a PO:

1. Go to **Main Menu > Manage My Inventory > Manage My Purchase Orders > Find a PO**.
2. Enter filtering criteria in the fields on the left to limit the list of purchase orders displayed.
3. Click **Begin Search**. The system displays the results in the right-hand side of the screen. To remove the filter from the list of records, click the **Clear Search Form** button. All purchase orders are then displayed in the list.
4. Select the row of a PO in the list and click the **View PO** button. Refer to the previous image.



Local SKU	Supplier's SKU	Item Name	Qty.	Lot Type	# per Lot	Exp. Cost	Order #	Notes
sofabed1	bed1	Sofa Bed	10	pieces	1	$500.00	0	
bed2	bed2	Stylish Bed	10	pieces	1	$400.00	0	
bed3	bed3	Federation Bed	10	pieces	1	$100.00	0	
bed4	bed4	Sleigh Bed	5	pieces	1	$0.00	0	
bed5	bed5	Chrome Bed	6	pieces	1	$0.00	0	
bed6	bed6	Kid's Bed	7	pieces	1	$0.00	0	

5. You can then choose to view each of the record types associated with the Purchase Order. You can also resend a purchase order to a supplier, print the purchase order or close a purchase order. You can also select a line item and print barcode labels for that item, or you can add, edit or cancel a line item on the purchase order.

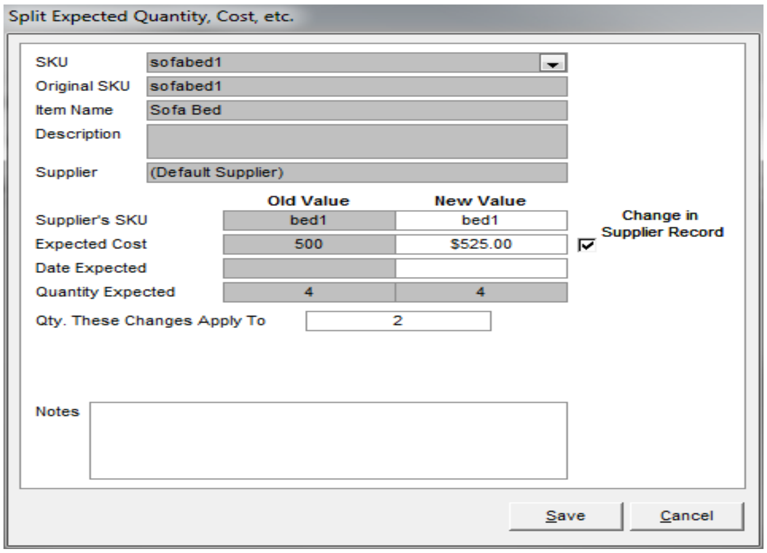
View Option	**Result**
Line Items	View the individual items listed on the initial purchase order. These line items may be edited until the PO is “locked” (added to a purchase order invoice). Once the PO is locked, this option provides a “snapshot” of the original PO placed with the supplier, and the Split, Add, Edit and Cancel buttons are hidden on the Line Items screen.
Expected	View and edit the quantity of items the merchant expects to receive from the supplier. The information here may or may not match that shown by the line items. This is the actual working area for PO management after the PO has been created and sent, and before you receive your inventory.
Received	View the quantity of items actually received from the supplier.
Invoiced	View the quantity of items for which your store has been invoiced by the supplier.
Returned	View any items on the PO that have been returned. (This feature is not available yet.)
Credited	View any items on the PO that have been credited. (This feature is not available yet.)

6. Depending on the **View Option**, select a line item and perform one of the following:

Line Item Functions	**Result**
Split	Split one line item from the PO into two line items to change the expected cost, quantity, etc., for just a portion of that line.

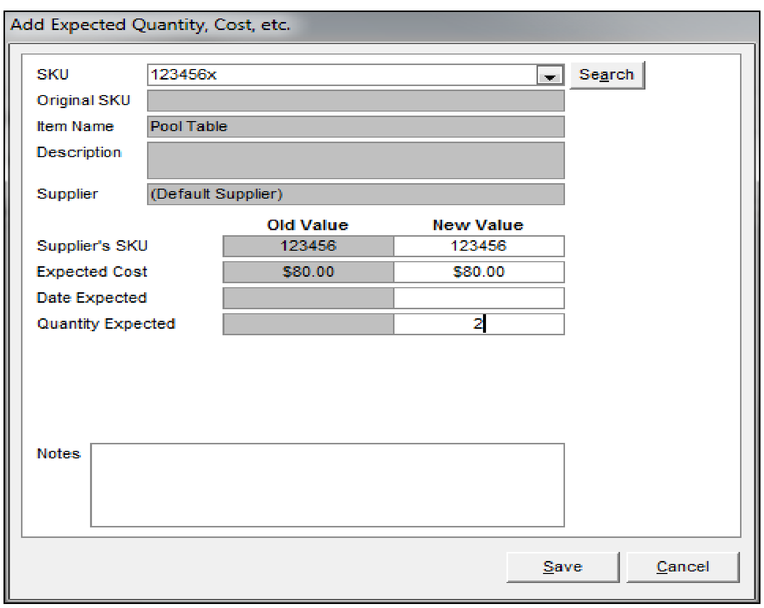
Line Item Functions	Result
Add	Add a line item or a Received or Expected record to the PO.
Edit	Edit a line item's cost, expected date, etc.
Cancel	Cancel the selected line item. This applies only to line items that are not yet "locked" (i.e., expected, received, and invoiced records).

a. If the **Split** button is clicked, the system splits the selected line item into two line items and displays the **Split Expected Quantity, Cost, etc.** dialog box:



The **Expected Cost**, **Supplier's SKU**, and **Date Expected,** can be modified and applied to a portion of the quantity of items that were originally ordered. Click **Save**.

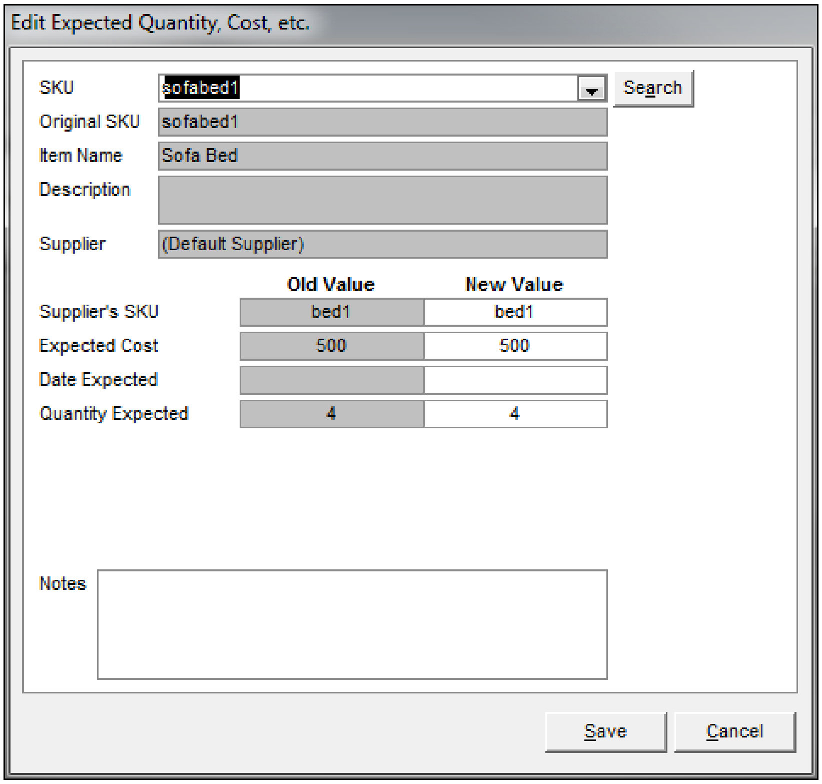
b. If the **Add** button is clicked, the system displays the **Add Expected Quantity, Cost, etc.** dialog box:



Select a **SKU** from the list and enter a **Qty. Expected** and **Date Expected** in the fields in the **New Value** column. The **Supplier's SKU** and **Expected Cost** can also be edited, if necessary. **Notes** can also be added. Click the **Save** button, and the system adds the line item to the PO.

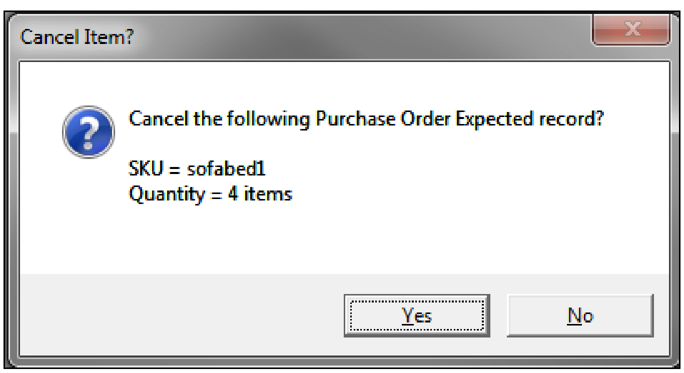
c. To edit an item, select it and click the **Edit** button. The system displays the **Edit Expected Quantity, Cost, etc.** dialog box where the fields in the **New Value** column and the **Notes** field can be edited.

Note: *Editing of **drop-ship** PO items is limited to the expected costs and SKUs; the quantity ordered cannot be modified. To edit a quantity, remove the item from the PO, return to the order, modify the detail record, and then reorder the drop-ship item.*

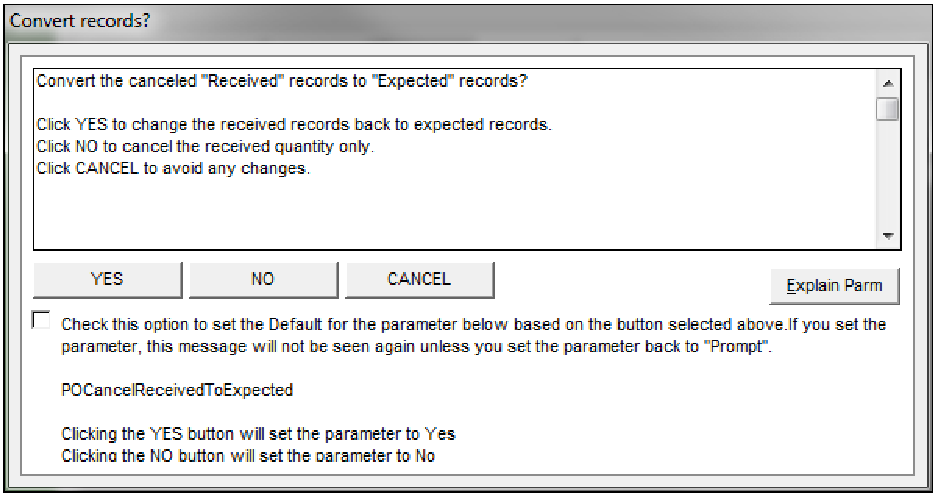


Make the desired changes and click the **Save** button.

d. If the Line Item **Cancel** button is clicked while viewing Expected purchase order records, the system displays the following dialog box:



If the Line Item **Cancel** button is clicked while viewing Received purchase order records for the PO, the system asks if the canceled line items should be converted back to Expected records or if the received quantity should be canceled.

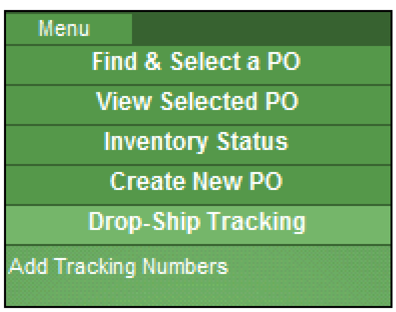


Seeing this message is controlled by the **POCancelReceivedToExpected** parameter. Select the check box to make the choice selected here the default behavior of the program. Once checked, you will no longer be prompted for the action to take. Refer to Setting System Parameters, in Chapter 2, for more information about changing system parameters.

Enter Tracking Numbers Manually

Complete the following steps to enter tracking numbers manually:

1. Go to **Main Menu > Manage My Inventory > Manage My Purchase Orders > Drop-Shipping > Add Tracking Numbers**.

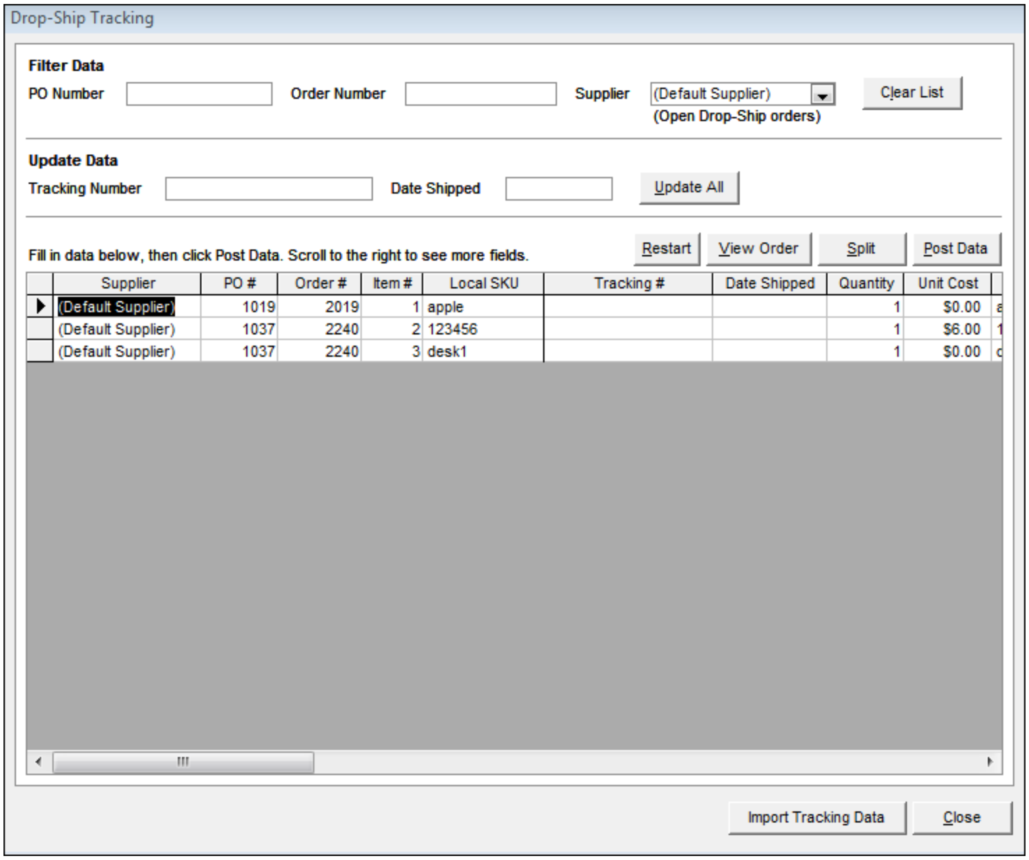


2. Build a list of items to receive tracking number information:

   a. To add tracking information for items on a single drop-ship purchase order, enter its number in the **PO Number** field and press **Tab** or **Enter**.

   b. To add tracking information for drop-shipped line items from a single Stone Edge Order Manager order, type The Stone Edge Order Manager number in the **Order Number** field and press **Tab** or **Enter**.

c. To add tracking information for all open drop-ship orders from a specific supplier, select the supplier from the **Supplier** drop-down list.



Once the list has been created, enter the appropriate **Tracking Number** and **Date Shipped** information in the fields of the same names and click the **Update All** button to have the same tracking information added to all of the line items in the list. If the items in the list have different tracking information, enter the unique information by copying and pasting or typing it directly into the **Tracking #** and **Date Shipped** fields on each line item in the list.

3. Click the **Post Data** button.

Import Tracking Numbers from a Text File

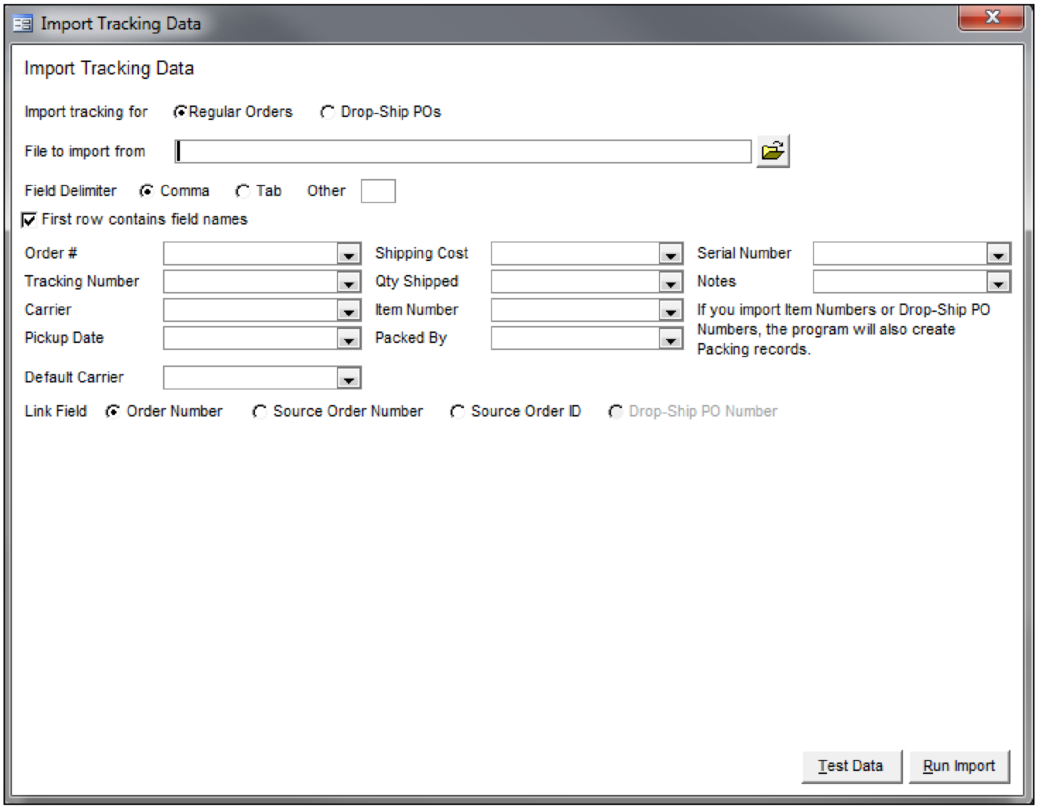
1. To import tracking numbers from a text file, click the **Import Tracking Data** button at the bottom of the Drop-Ship Tracking screen to open the *Import Tracking Data* screen. This screen is used for importing tracking numbers for drop-ship orders and for orders that are shipped by the merchant Select the appropriate radio button before importing tracking information from this screen. For this example, select the **Drop Ship POs** radio button.
2. Click the **Folder** icon to locate the text file with the tracking information to be imported.
3. When importing drop-ship tracking information, always select **Drop Ship PO Number** for the **Link Field** that The Stone Edge Order Manager should use to match the imported tracking information to the PO records.

> ***IMPORTANT:*** *Drop-Ship tracking numbers **MUST** be accompanied by the Drop-Ship PO Number for the system to properly update the PO and the Order!*

4. Use the drop-down lists to map the information in the text file to their corresponding fields in The Stone Edge Order Manager.
5. Click the **Test Data** button before performing the batch import. The system displays a sample

record built from the selected text file and import criteria or notifies you if required fields are missing.

***Note**: If a significant number of tracking numbers are being imported, it would be wise to backup the data file prior to importing the data. There is no “Un-do” button for this operation.*



6. When the import options are configured properly, click the **Run Import** button. The system enters the drop-ship tracking information from the text file into the appropriate Stone Edge Order Manager tables.

Receiving Inventory for POs

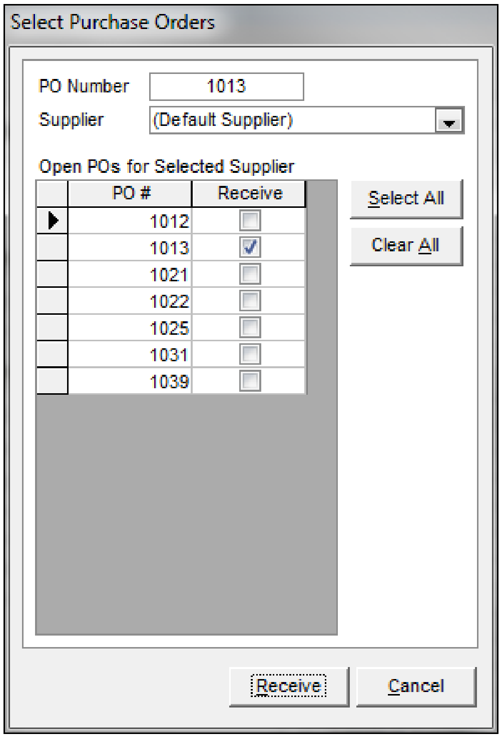
The **Receive Inventory** tab contains a link to **Receive Against a Purchase Order** (log inventory as it is received from suppliers).

Complete the following steps to receive inventory:

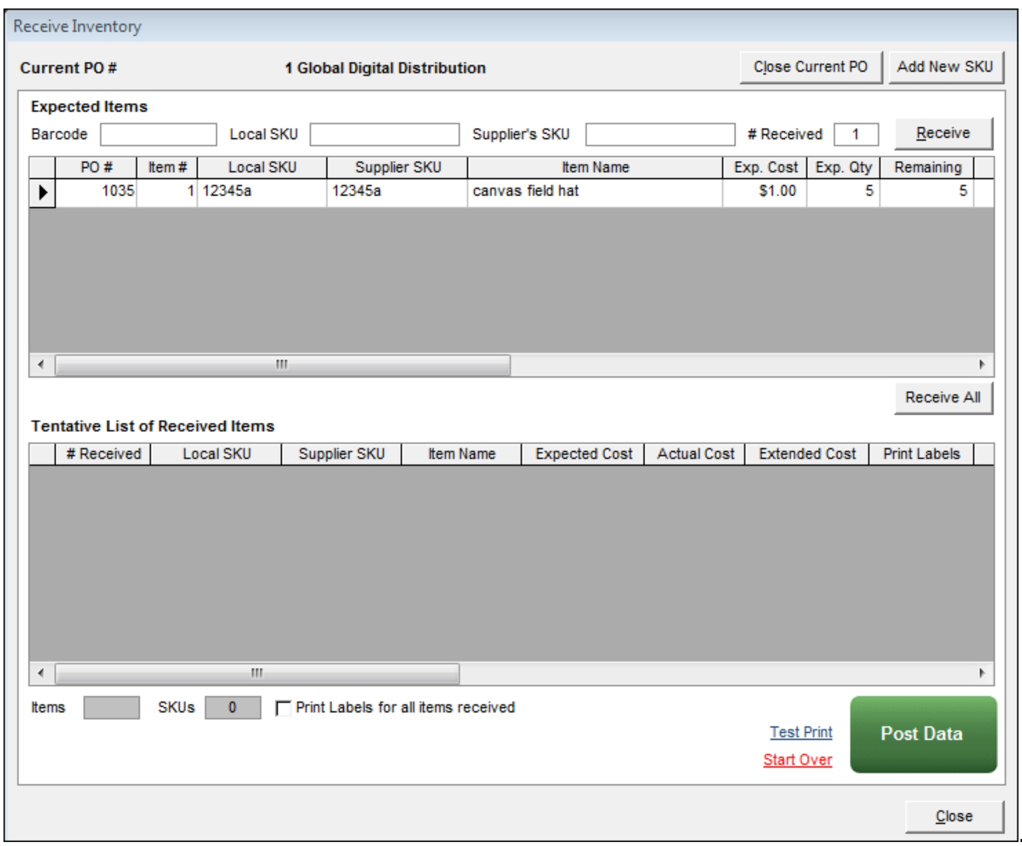
1. Go to **Main Menu > Manage My Inventory > Manage My Purchase Orders > Receive Inventory > Receive Against a Purchase Order** to open the Select Purchase Orders screen.
2. Enter a specific purchase order number or select a supplier from the drop-down to produce a list of open purchase orders for that supplier.

3. Pick and choose one or more purchase orders by selecting the **Receive** box, or use the **Select All** button to choose all of the purchase orders in the list.

Note *Inventory can be received from multiple purchase orders from the same supplier at the same time.*



4. Click **Receive**.



5. Click **Receive All** or select specific SKUs and click **Receive** to build a **Tentative List of Received Items** in the lower half of the screen.
6. Modify the **# Received** and **Actual Cost** fields in the **Tentative List of Received Items** area as necessary
7. Select the **Print Labels for all items received** check box to automatically print barcode labels for the items displayed in the **Tentative List of Received Items** area, or select the **Print Labels** check box to print labels for selected items only. The format of the labels is controlled by the system parameter **BarcodeLabelTemplate**.
8. When you are finished, click the **Post Data** to mark those items as received.

***Note:** The system closes the PO automatically if all items are received. Click the **Close PO** button if there are **Expected Items** remaining that will never be received. The system then asks you to confirm the deletion of all remaining Expected records for the PO. Click the **Yes** button to proceed. A PO should only be closed manually if you are sure that the remaining **Expected Items** will never be received.*

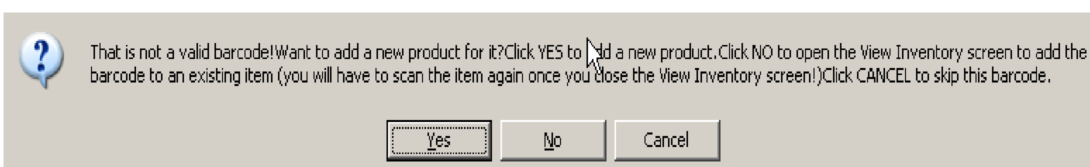
Ways to select items to be received:

- Click the **Receive All** to move all **Expected Items** to the **Tentative List of Received Items** area.
- Double-click any field in a row, except the **PO #** field, to add the item to the **Tentative List of Received Items**. The system prompts for verification.
- Type the SKU of the item to be received in the **Local SKU** or **Supplier's SKU** field at the top of the screen, or scan the **Barcode**. Enter the quantity that has been received in the **# Received** field. Then, click the **Receive** button in the **Expected Items** section of the window. The item information appears in the bottom area of the screen. If you attempt to receive more than was ordered, the system asks for verification before receiving the higher quantity of an item.

  If you scan a SKU that appears multiple times in the **Expected Items** list, the system first looks to see if there is a PO number in the **Current PO #** field – if so; it receives that SKU from that PO. If the **Current PO #** field is empty, the system receives the first instance of that SKU found in the **Expected Items** list.

  If you scan or enter an item that is not in the current list of **Expected Items**, but *is* present in The Stone Edge Order Manager's inventory, and it is assigned to the current supplier, the program asks if you want to receive that item even though it is not expected.

  If you scan an item that is not present in your inventory, the program gives you an option to add it as a new product or add the barcode to an existing product record.



  After saving changes to the inventory item record, return to the Receive Inventory screen to finish receiving products.

- Unexpected items that are not currently defined in The Stone Edge Order Manager can also be received by clicking the **Add New SKU** button in the upper-right hand corner of the Receive Inventory screen. Type in the related product information and click **Save** to return to the Receive Inventory Screen and receive the items by one of the methods mentioned above.

Entering Purchase Order Invoices

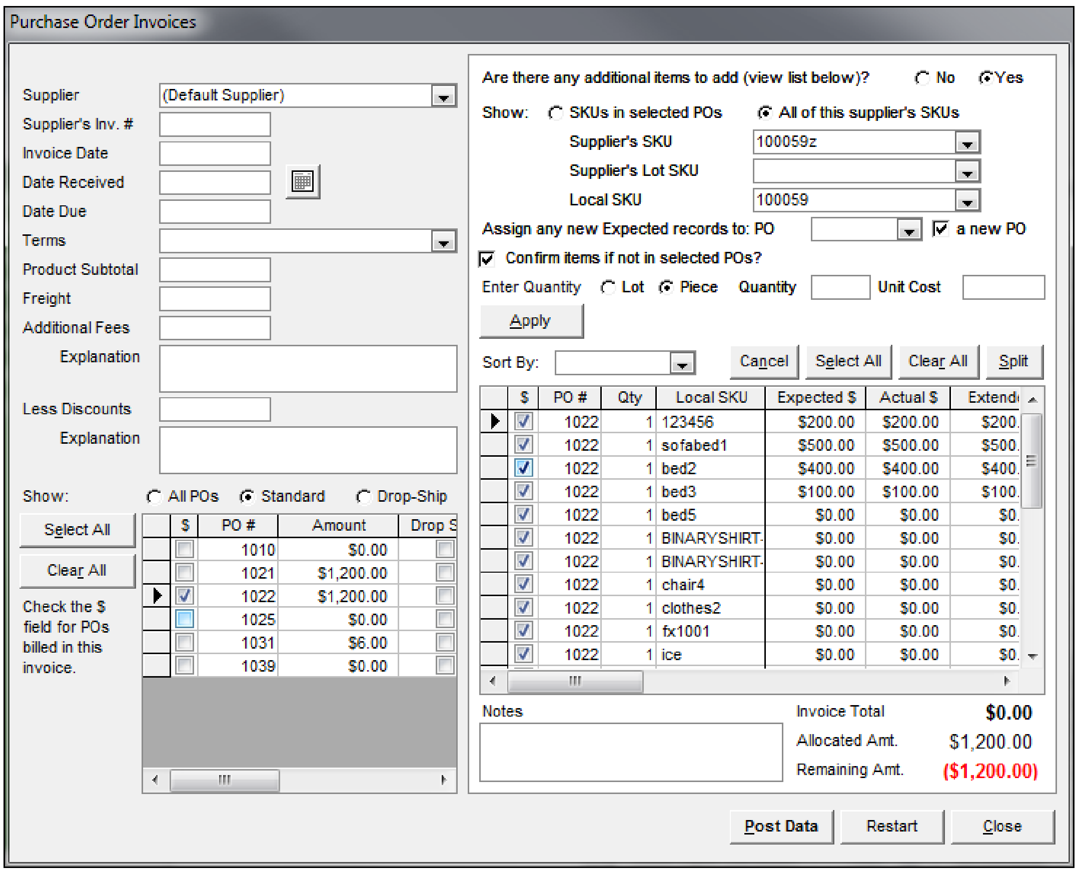
When invoices are received from suppliers, enter them into The Stone Edge Order Manager. Next you can export them to QuickBooks as bills to be paid. Each invoice can cover part or all of one or more purchase orders, for both regular and drop-ship purchase orders.

The basic process at this screen is:

- Enter general information about the invoice (invoice number, date, terms, amounts, etc.).
- Select the purchase orders that are partly or completely covered by the invoice.
- Indicate which items were charged on this invoice.
- Reconcile the **Allocated Amount**, plus any fees and discounts, with the **Invoice Total**.
- Post the data when ready.
- Optionally, you can also add items to the selected purchase order or a new PO.

Complete the following steps to log and work with invoices:

1. Go to **Main Menu > Manage My Inventory > Manage My Purchase Orders > Invoices > Enter Invoices for Purchase Orders** to open the **Purchase Order Invoices** screen.



1. Select the **Supplier** from the drop-down list. The system displays all of the open POs for that supplier in a list on the right-hand side of the window. If the **POInvoiceReceivedOnly** parameter is set to TRUE, the list of POs to invoice is restricted to Received records only.
2. Enter general information about the invoice (invoice number, date, terms, amounts, etc.) in the other fields on the left-hand side of the screen.

***Note:** To track **Freight** and **Fees** separately in QuickBooks, use the fields supplied. Otherwise, enter the full invoice total in the **Product Subtotal** field and modify cost per unit for each product to account for the difference in the **Allocated Amt.** field.*

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3. Select one or more purchase orders to invoice from the list at the bottom of the form.
4. To invoice only a few items in the list click **Clear ALL** and then check the individual **$** boxes for the items to be invoiced at this time.
5. The items, quantities, and costs for items that are selected must add up to the product subtotal on the invoice. The **Allocated Amt.** and **Remaining Amt.** fields at the bottom of the screen track those amounts.
6. When finished, click the **Post Data** button to save the invoice data in The Stone Edge Order Manager.

   The **Select All** and **Clear All** buttons are used to select or deselect items in the list.

   If you are invoiced for less than the quantity ordered, use the **Split** button to create a new record with the number of items not invoiced on this PO and uncheck it in the **$** column.

   To add an item to the invoice that was not on the purchase order, select the **Yes** radio button at **Are there any additional items to add (view list below)**. Add a **Suppliers SKU** or a **Local SKU** from the drop-down lists. Enter the **Quantity** invoiced and the **Unit Cost**. In the **Assign any new Expected records to:** section, select whether to add the items to a current purchase order or a new purchase order. The system creates an additional line item for the affected invoice and adds the item to the PO specified.

   Restart clears all of the data entered on the screen to date and allows you to start over.

WARNING: *If invoices will be exported to QuickBooks or another accounting program for payment, that information is not sent when the* ***Post Data*** *button is clicked; it is sent the next time accounting data is exported. At this time, invoice data* ***CANNOT BE EDITED*** *after it has been posted. Be absolutely sure that the information is correct prior to posting the invoice information.*

Exporting Invoices to QuickBooks

Once invoices have been received, logged, and edited, they can be exported to QuickBooks or another accounting program. You must have already configured The Stone Edge Order Manager to work with QuickBooks before attempting to export invoices. Refer to Chapter 2, *Accounting Export Setup* for more information.

To export invoices, go to **Main Menu > Settings > Data Functions > Export Accounting Data.** For more information, refer to the *Knowledge Base.*

5 Managing Customers

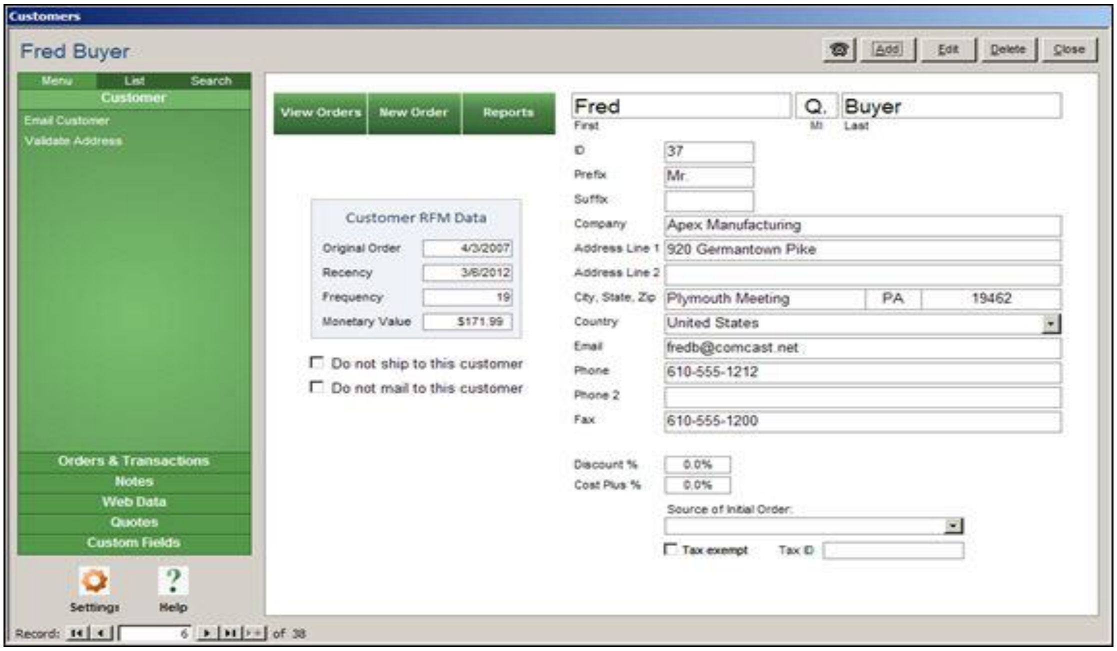
The Stone Edge Order Manager builds and maintains a customer database as new orders are imported or manually entered. The **Customers** window allows you to search for customers, add, edit and delete customers, enter customer notes, etc.

This chapter is divided into the following sections to help manage customers and their information:

Managing Customers

Go to **Main Menu > Manage My Customers > View & Manage My Customers** to see your customer records. Scroll through the entire group of records or use **List** or **Search** to find a specific record.

Customer Tab

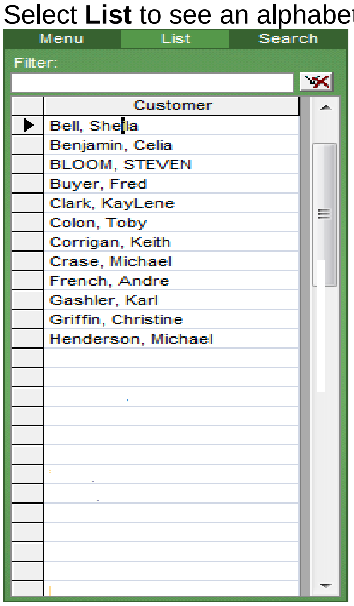


Menu

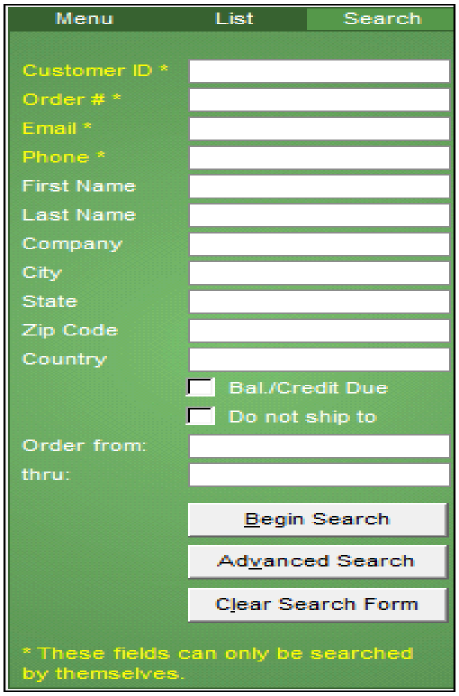
Select **Menu** to return to the default view of the Customer Accordion.

List

Select **List** to see an alphabetized list of customers. Click a row to view that customer's information.

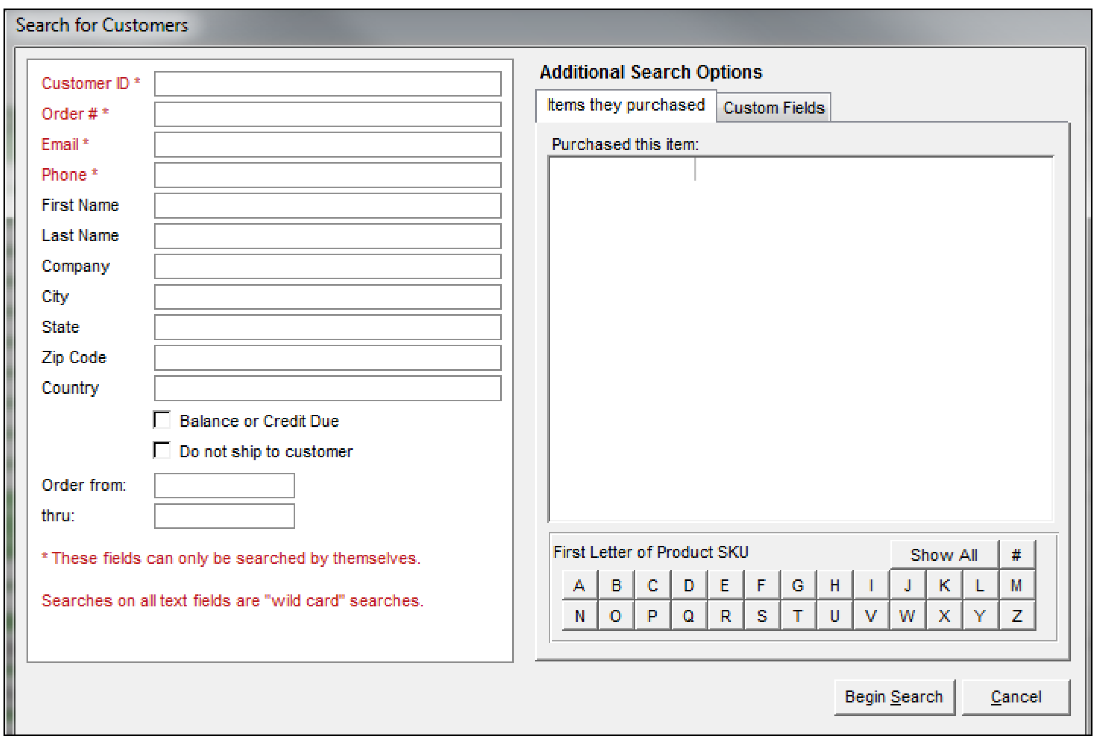


Search



You can enter data in one or more of the fields shown and click **Begin Search,** or you can click **Advanced Search** to open the *Search for Customers* screen where you can search for a customer by items they purchased, data in any custom fields you have defined, or if they have a Balance or Credit Due.

If searching on more than one field, the program only finds customers that match *all* of the criteria entered.



***Note:** The fields marked with an asterisk (*) require the exact data to match the actual record. All other fields are "wildcard" fields. For example, if searching by customer ID, the entire ID must be entered. However, if searching by the customer's name, and "S" is entered in the **Name** field, all of the records beginning with the letter "S" are returned.*

Searching by Items a Customer Has Purchased

1. Click the **Search** button.
2. Click the **Advanced Search** button.
3. **Additional Search Options** > **Items they purchased** is the default view.
4. Click **Show All** to see all SKUs in The Stone Edge Order Manager, or click a letter button at the bottom right to see all SKUs that start with that letter. For example, clicking 

displays only SKUs beginning with the letter "B". (e.g., B392773). Click the # button to see all SKUs that begin with a number.
5. Select the row of the product to be used as the search criteria.
6. Click **Begin Search**. The program displays the matching record set.
7. Scroll through the set to view each customer.

View Orders

This opens the Manual Orders wizard with the current customer information already filled-in. Refer to ***Entering Orders Manually***, in Chapter 7, for more information on manually entering a new order

New Order

This opens the Manual Orders wizard with the current customer information already filled-in. Refer to ***Entering Orders Manually***, in Chapter 7, for more information on manually entering a new order.

Reports

You can print customer statements here. Enter filter criteria in the *Customer Statement Filter* form to limit the reports by order date or customer.

Email Customer

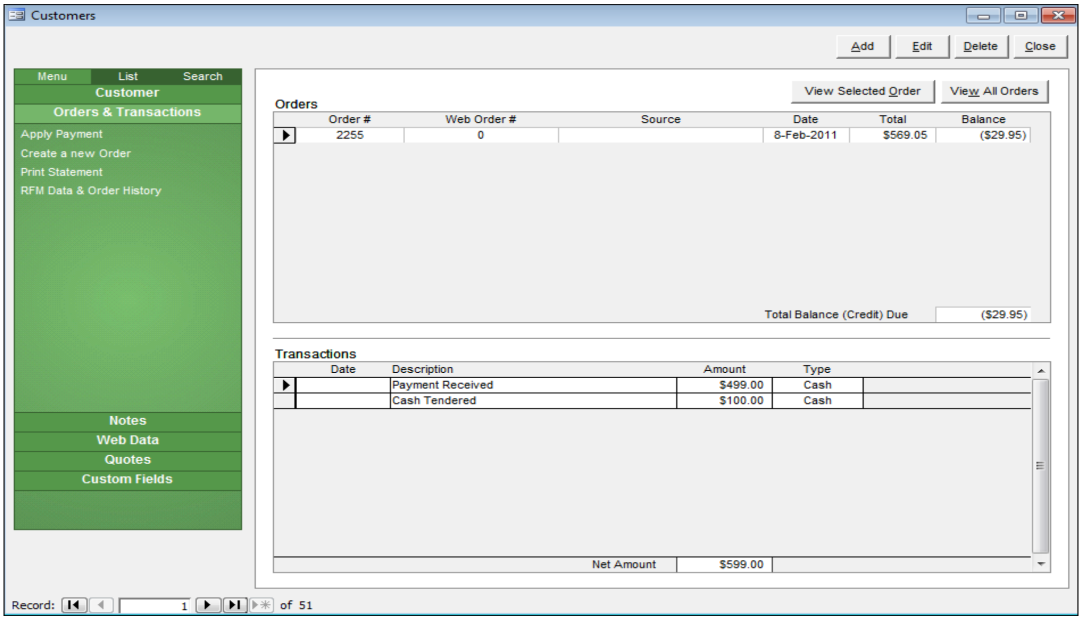
Opens the *Send Email* screen, with the customer's email address pre-populated.

Validate Address

Check the validity of the customer's address against the USPS servers.

Orders & Transactions Tab

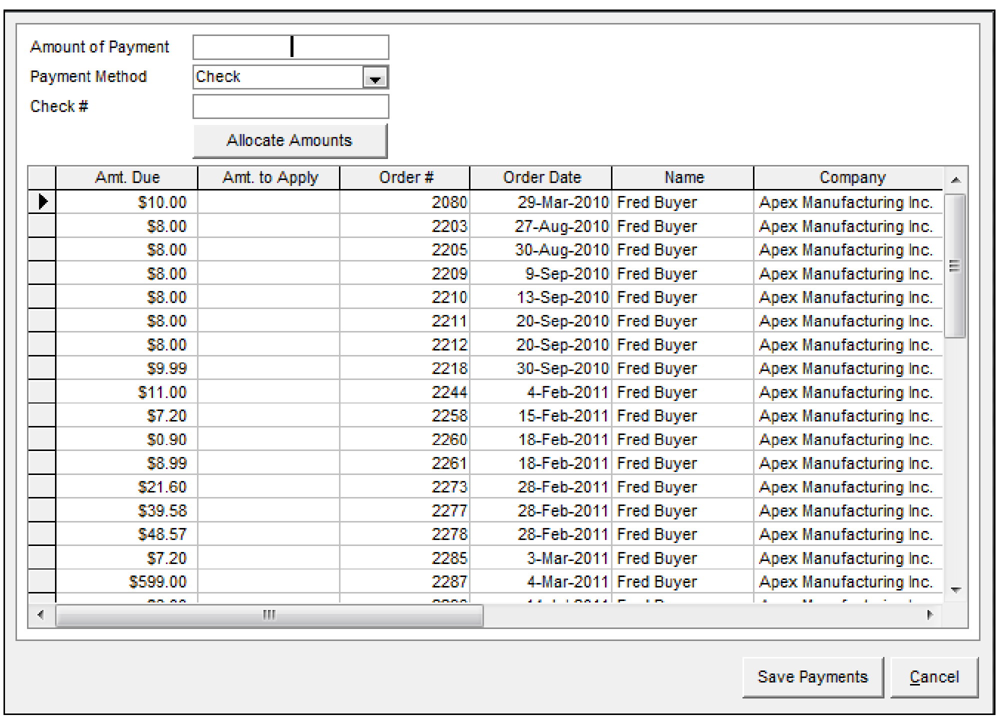
The **Orders & Transactions** tab displays the order and transaction summaries for the current customer:



To zoom into one of the current customer's orders, select an order from the list the order and click the **View Selected Order**, or **View All Orders** to see all of the customer's orders at the Process Orders screen.

Apply Payment

If the customer sends a payment by mail, you can enter that information in the *Apply Payment to Multiple* Orders screen. You can allocate a portion of the payment to selected orders.

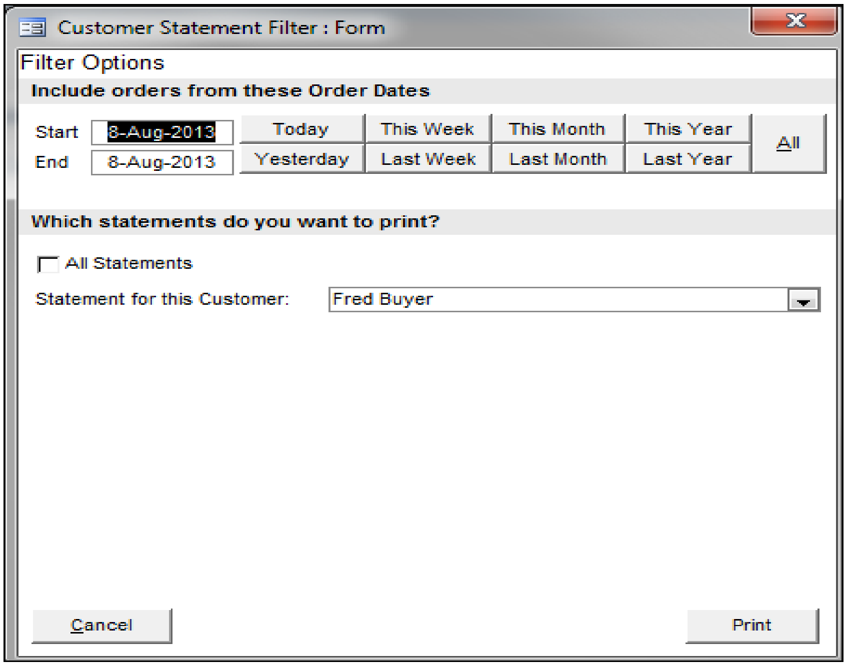


Create a new Order

Opens the *Manual Orders* screen with the customer data already entered.

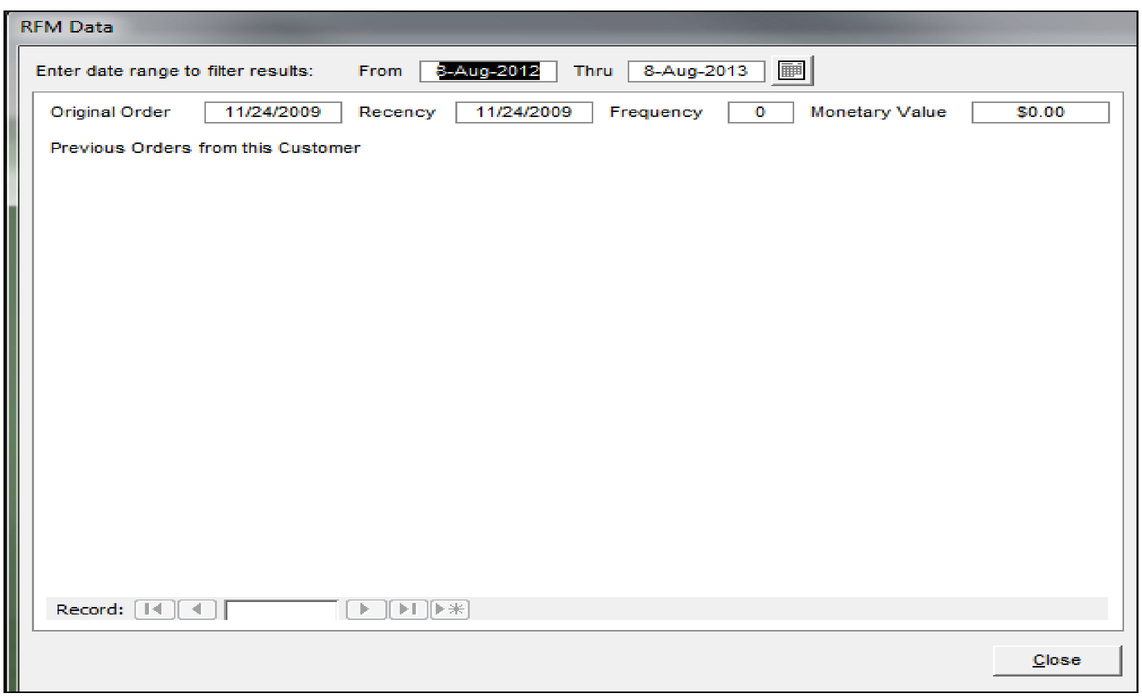
Print Statement

Opens the Customer Statement Filter where you choose a specific time period or customer for whom a statement is printed.



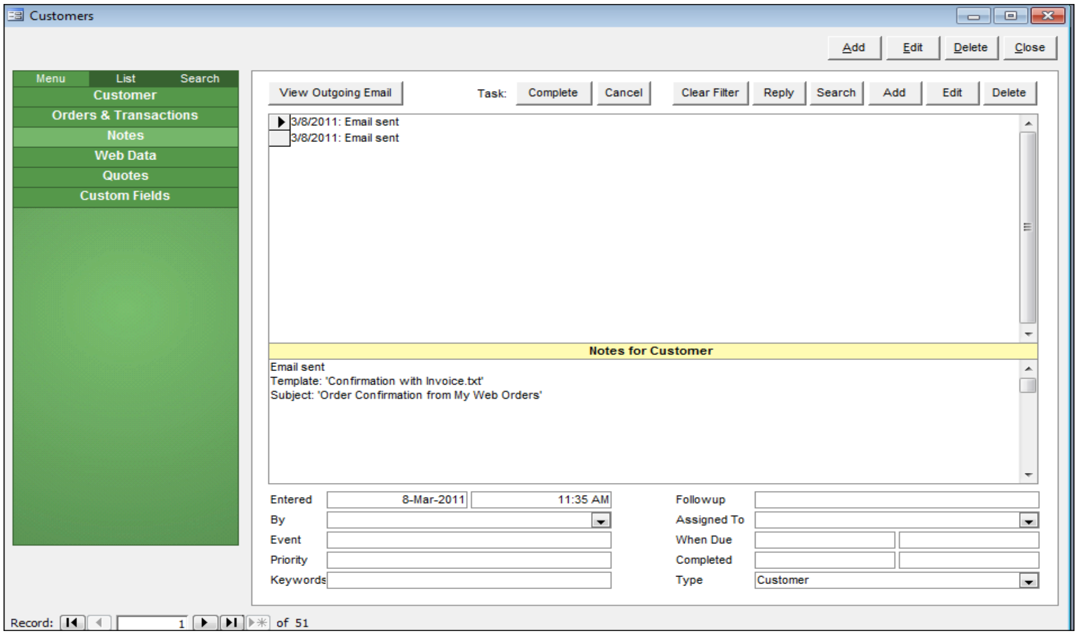
RFM & Order History

Enter filtering criteria to produce information about the current customer's previous purchases.



Notes Tab

The **Notes** tab displays email sent, and notes and tasks associated with the current customer. Notes can also be added, edited or responded to at this screen:

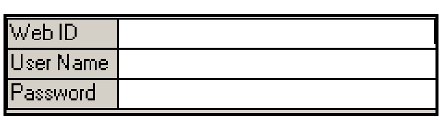


Complete the following steps to view, add, or edit notes to a customer record:

1. Open the Customer screen and locate the customer's record. Refer to ***Searching for a Customer***, earlier in this chapter, for more information on locating customer records.
2. Click the **Notes** tab. All of the notes associated with the customer record appear.
3. Select a note from the list in the top half of the screen and see more details in the lower half of the screen.
4. Use the buttons on the **Notes** tab to add or edit a note, review the email attached to a note, etc. Refer to ***Checking Tasks & Notes***, in Chapter 2, for more information on performing these tasks.

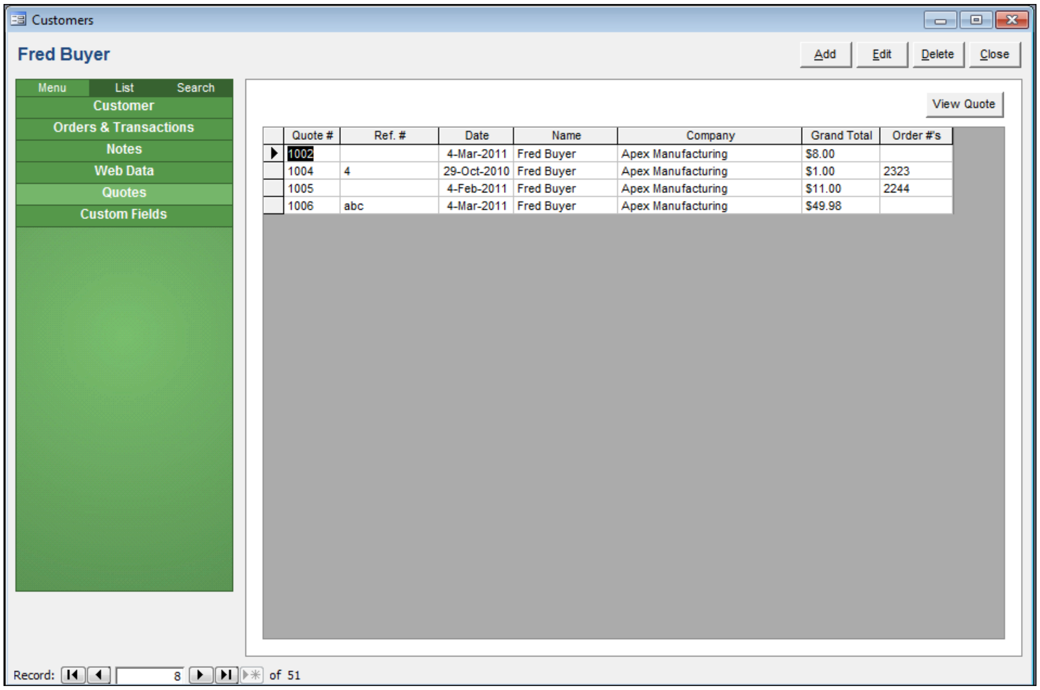
Web Data Tab

The **Web Data** tab allows you to view and edit the data the customer uses to log in to the merchant's online store. This data is only applicable to certain shopping cart systems, such as Yahoo! Store and Yahoo! Merchants Solutions shopping carts.



Quotes Tab

The **Quotes** tab displays a list of any quotes that have been entered for the selected customer:



To view a quote associated with a customer record, complete the following steps:

1. Locate the customer's record. Refer to ***Searching for a Customer***, earlier in this chapter, for more information on locating customer records.
2. Click the **Quotes** tab. This tab contains a list of quotes for the selected customer.
3. Select the quote to be viewed in detail by clicking its row.
4. Click the **View Quote** button to view the selected quote. The system displays the quote in the Manual Orders wizard. Refer to ***Managing Quotes***, in Chapter 7, for more information on creating and editing quotes.

Custom Fields Tab

The **Custom Fields** tab is only visible if you have defined some custom Customer fields in Stone Edge. Refer to Knowledge Base topic, *Configuring Custom Fields* for more information.

Customer Functions

Creating a New Customer

Customer records are added to the database as orders are manually entered or imported from a website. New customer records can be also be created manually by clicking the **Add** button on the **Customers** screen.

1. Go to **Main Menu > Manage My Customers > View & Manage My Customers**. Click the **Add** button and the system opens a new "blank" customer record:
2. Enter the customer's information.

3. Click **Save**. The new customer record is added to the store's customer database.

Editing Customer Information

Use the **Edit** button on the **Customers** window to edit an existing customer record.

1. Go to **Main Menu > Manage My Customers > View & Manage My Customers**
2. Locate the customer record to be edited. Refer to ***Searching for a Customer***, earlier in this chapter, for more information.
3. Click the **Edit** button. The system opens the current customer record for editing.
4. Edit the customer's information as needed.

Note*: Use the* ***Do not ship to*** *and* ***Do not mail to*** *check boxes to prevent The Stone Edge Order Manager from approving and shipping orders to a specific customer.*

5. Click the **Save** button. The system saves the customer record with the new changes.

Deleting a Customer

The **Delete** button permanently deletes an existing customer record from the Stone Edge database.

Note: *The Stone Edge Order Manager will not allow a customer that has one or more orders in the system to be deleted. It is possible to assign orders to another customer record so that the first record can be deleted. For instance, if there are multiple customer records for the same person, the orders from the record to be deleted can be assigned to the other existing customer record.*

Complete the following steps to delete a customer:

1. Locate the customer record to be deleted. Refer to ***Searching for a Customer***, earlier in this chapter, for more information.
2. Click the **Delete** button. The system displays a deletion confirmation dialog.
3. Click the **Yes** button to permanently delete the customer record.

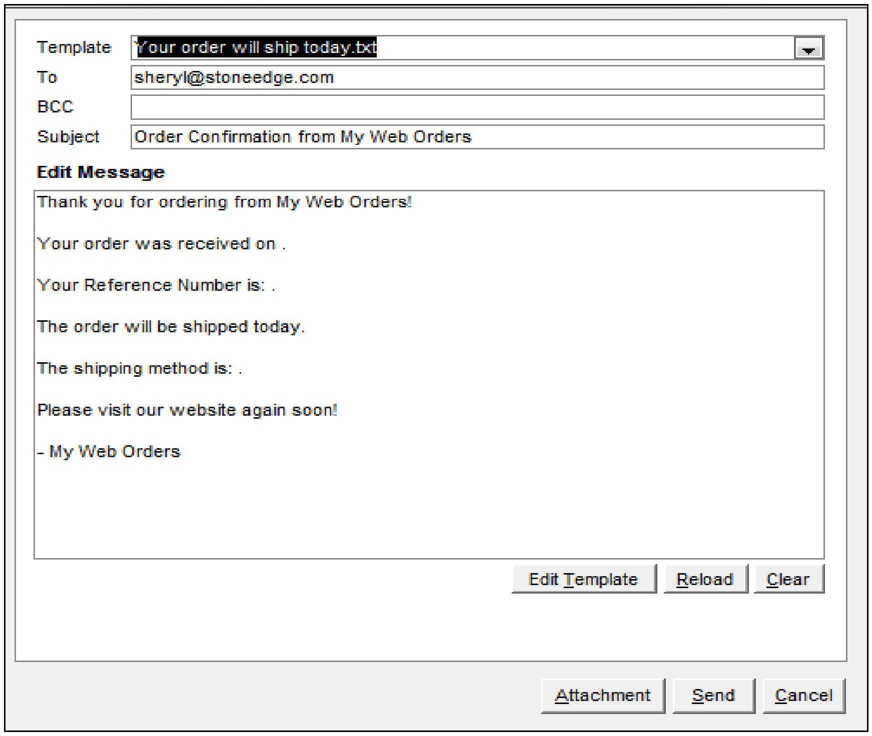
Sending Email to a Customer

The Stone Edge Order Manager allows you to set up email templates which are used when the program generates emails to customers. Many templates are supplied with the program, and you can create new templates or modify existing templates to meet your needs. For more information on how to edit and configure email templates, refer to ***Editing an Email Template***, in Chapter 2.

Complete the following steps to send an email message to a customer:

1. Locate the customer. Refer to ***Searching for a Customer***, in this chapter, for more information.

2. Click the **Email Customer** link in the accordion**.**



3. Select the template to be used from the **Template** tab.
4. To start with a blank email, do not select a template. Add or alter the text in the **Edit Message** field of the outgoing email message. Changes made by manually editing the text only affect the outgoing message, not the template itself. However, email templates can be edited from this tab by clicking the **Edit Template** button. Any changes made to a template are permanent once the **Save** button is clicked.
5. Use the **Reload** button to “un-do” changes prior to clicking the **Save** button.
6. Use the **Clear** button to remove data from the body of the message and the subject line.
7. Optional: Enter an email address in the **BCC** (Blind Carbon Copy) field to send a copy of the message to that email address without the customer seeing it the distribution list.
8. Optional: Click the **Attachment** button to navigate to the location of another file to be included with the email.
9. Click **Send**.

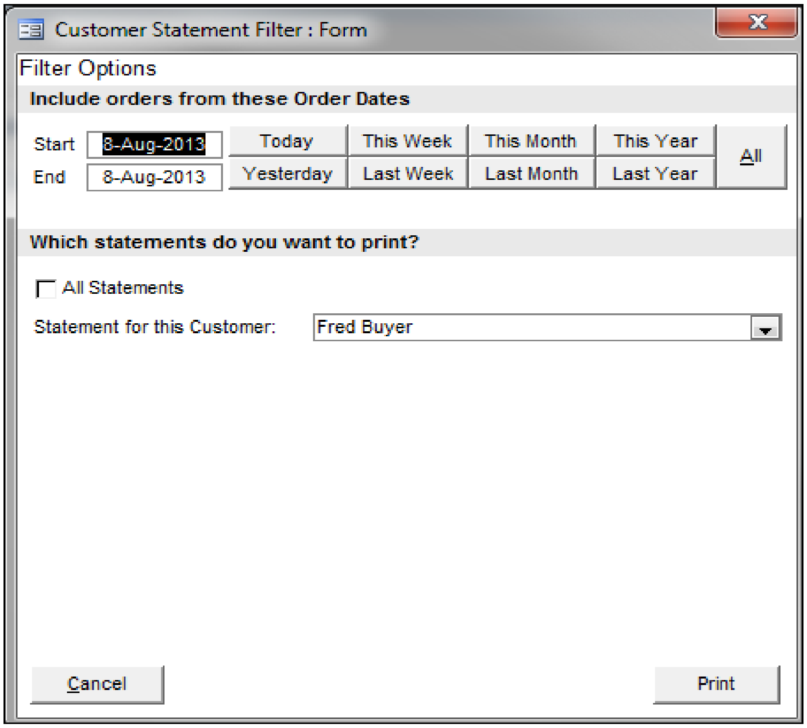
The system sends the email using the default mail settings.

Printing a Statement

You can print an account statement to be mailed to customers.

1. Select **Reports** at the top of the Customers form or the **Print Statement** link on the **Orders & Transactions** accordion.

2. Enter the appropriate criteria on the Customer Statement Filter screen to limit the time period for which statements are produced or to print a statement for a single customer.

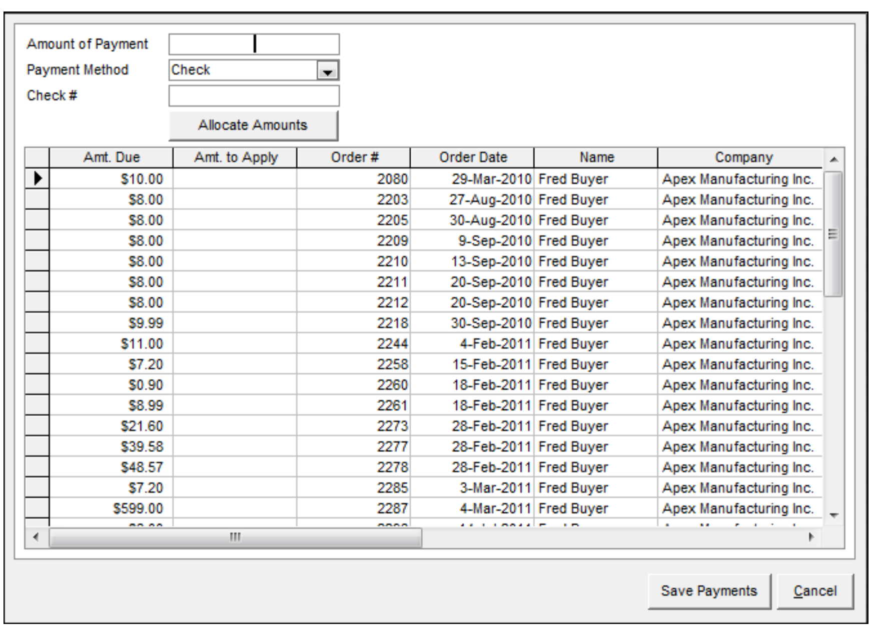


3. Click the **Print** button to see a preview of the report (customer statements). Click the printer icon on the toolbar to send the report to the default printer.

Applying a Payment

To apply a payment to a customer record:

1. Locate the customer record for which a payment is to be applied.
2. Click the **Apply Payment** link on the *Orders & Transactions* tab.



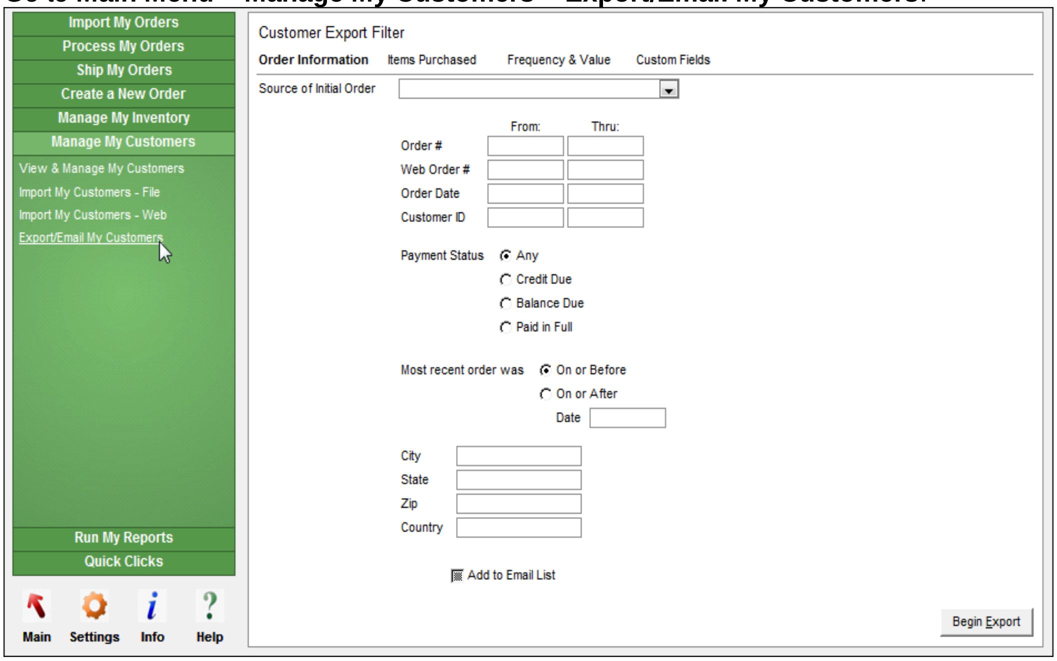
Amt. Due	Amt. to Apply	Order #	Order Date	Name	Company
$10.00		2080	29-Mar-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2203	27-Aug-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2205	30-Aug-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2209	9-Sep-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2210	13-Sep-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2211	20-Sep-2010	Fred Buyer	Apex Manufacturing Inc.
$8.00		2212	20-Sep-2010	Fred Buyer	Apex Manufacturing Inc.
$9.99		2218	30-Sep-2010	Fred Buyer	Apex Manufacturing Inc.
$11.00		2244	4-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$7.20		2258	15-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$0.90		2260	18-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$8.99		2261	18-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$21.60		2273	28-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$39.58		2277	28-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$48.57		2278	28-Feb-2011	Fred Buyer	Apex Manufacturing Inc.
$7.20		2285	3-Mar-2011	Fred Buyer	Apex Manufacturing Inc.
$599.00		2287	4-Mar-2011	Fred Buyer	Apex Manufacturing Inc.

3. Enter the **Amount of Payment**, the **Payment Method** and **Check #**, if applicable.
4. If the payment is to be received for specific statements, select the row(s) for which payment is to be applied and enter amount(s) that should be applied to each one in the **Amt. to Apply** column, and click the **Save Payments** button.
5. To apply the payment received against any or all outstanding statements, click the **Allocate Amounts** button and the program applies the payment received against the oldest outstanding statement and spans other statements up to the amount that was received (total amount of the payment).
6. Click the **Save Payments** button. The statements to which payment was applied no longer appear in the list of outstanding statements.

Exporting Customer Data

The **Customer Export Filter** window is opened by the **Export/Email My Customers** link on the **Manage My Customers** accordion. Customer data can be exported to a tab or comma delimited text file. All customer records can be exported, or you can filter the customer records to limit the export to a specific group of customers. You can also pick which fields to export, and control the format of the text file.

1. Go to **Main Menu > Manage My Customers > Export/Email My Customers**.



2. To export all customers, click **Begin Export** without entering any selection criteria. This opens the **Export Customers** screen. Skip to step three. Otherwise, limit the export by doing any of the following:

   To select customer records use any combination of the filter options:

   - Select the **Source of Initial Order**.
   - Enter a range of **Order** #s, **Web Order** #s, **Order Date**s, or **Customer ID**s.
   - Select a **Payment Status**.
   - Enter a **Date**, and select **On or Before** or **On or After** to select a date range of orders.

- Enter a **City**, **State**, **Zip**, or **Country** to select a geographical region of customers.

To select customer records based on a product **SKU**, select the **Items Purchased** tab.:

a. Select whether to search **Orders that:** Include or have backorders for:

   i. All SKUs

   ii. SKUs whose names begin with a certain value

   iii. Any SKU in list below

b. Skip to step 3 unless using a list of products as a filter. Build the product list by one of the following methods:

   i. Select the **SKU** radio button at the bottom left of the window

      a) Click the **All** button to see all SKUs in alphanumeric order

      b) Click a letter or the **#** button to see SKUs that begin with that letter or a number in alphanumeric order.

   ii. Select the **Name** radio button at the bottom left of the window

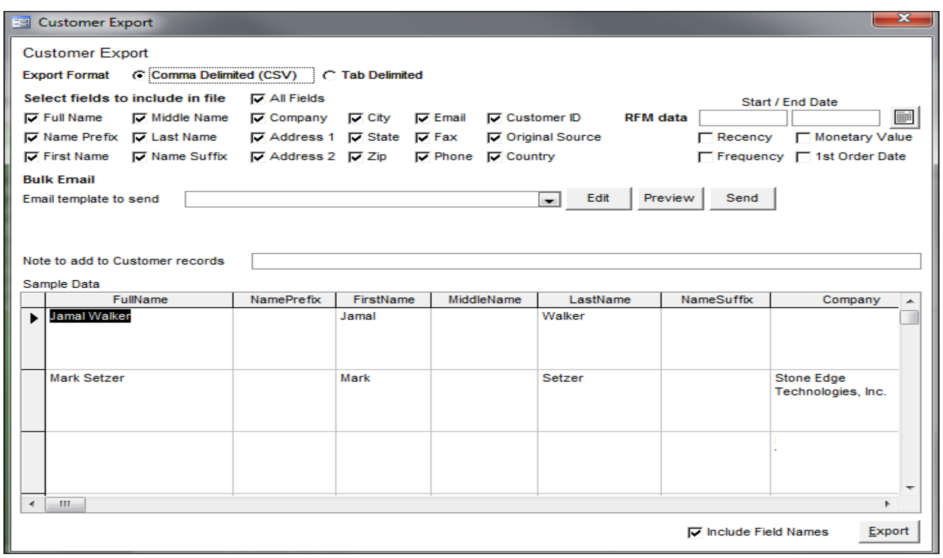
      a) Click a letter or the **#** button to see product names that begin with that letter or a number in alphanumeric order.

   iii. Click the **Add** button for each product to be used as a filter.

   iv. Use the **Delete** button to remove products from the list, if necessary.

- To filter customers based on order frequency and/or value, go to the **Frequency & Value** tab. (For more information about RFM [Recency, Frequency, Monetary Value] data, see the **Orders & Transactions** Tab section, earlier in this chapter.)
- To filter customers based on data in custom fields, go to the **Custom Fields** tab and select the custom field to be used as the filter.

3. Click the **Begin Export** button to begin the process of exporting customer records to a text file. The **Customer Export** screen appears:



The **Export Format** area on this screen is only for exporting customer data to text files. The **Select fields to include in file"** section of the form is used for both creating text files and sending bulk email.

The **Bulk Email** section is only used for sending email messages to the selected group of customers.

The **Sample Data** area at the bottom of the screen shows the list of selected customers and fields exported to a text file or those customers who will be the recipients of the bulk email message.

4. To export the data to a text file, choose the **Export Format** (**Comma Delimited** or **Tab Delimited)**, and whether the text file should **Include Field Names** in the first row of data.
5. Select the fields to be included in the **Select fields to include in file** section of the screen. Select one or more fields individually or use the **All Fields** box to choose all fields that are listed on the screen. The **Clear All** button de-selects every field.
6. Click the **Export** button to create the text file. The program prompts for a name and location for the file.

Sending Bulk Email to Customers

The Stone Edge Order Manager can send an email messages to a group of customers at once. The system parameter, **EmailSendMethod** must be set to **OrderManager** to use this feature.

Complete the following steps to send bulk email:

1. Refer to ***Exporting Customer Data***, above, for information on how to build the list of customers.
2. At the **Export Customers** screen, select an email template from the **Email template to send** drop-down box.
3. If necessary, click **Edit** to revise the email template. Any changes made here will permanently affect the selected template.
4. Click the **Preview** button to see the email template.
5. Optional: Enter a note that the program will add to the customer record for each email message sent.
6. Click **Send**. The system displays a message box reporting the number of emails that were sent and how many bad, or missing email addresses were encountered.

Note: *Any customer record with* ***Do not mail to this customer*** *checked on the* ***Customers*** *screen will be excluded from the bulk emailing.*

6 The Point of Sale System

The Stone Edge Order Manager’s Point of Sale (POS) interface acts as a “virtual cash register” for merchants who also have a brick and mortar presence.

The system supports a wide range of retail hardware, including barcode scanners, credit card readers, pole displays, cash drawers, receipt printers and touch screen monitors.

The Stone Edge Order Manager’s POS system has been optimized for use with a touch-screen monitor, but it can be used with a regular monitor, mouse and keyboard. The program works with any Windows-compatible monitor.

This chapter is divided into the following sections:

- ***Setting Up the Point of Sale***
- ***Using the New POS Interface***
- ***Auditing Shifts***

Setting Up the Point of Sale System

The **Point of Sale Setup** screen is where the POS configuration settings are accessed. Each tab on that form contains different settings that control how the program behaves, displays information, processes and records orders, and interfaces with bar code scanners, cash drawers and other peripheral hardware.

Be advised that errors may be encountered if you attempts to configure and test some of the devices without having them physically attached to the workstation.

Access the **POS Setup** screen by navigating to:

Main Menu > Settings > Order Functions > Point of Sale Setup

or

Main Menu > Settings > System Functions > Point of Sale Setup

The **Store Info** tab is the default view when the POS Setup screen is opened.

The **Point of Sale** form contains the following tabs:

Store Info

Printing

Cash Drawer

Scanners

Pole Display

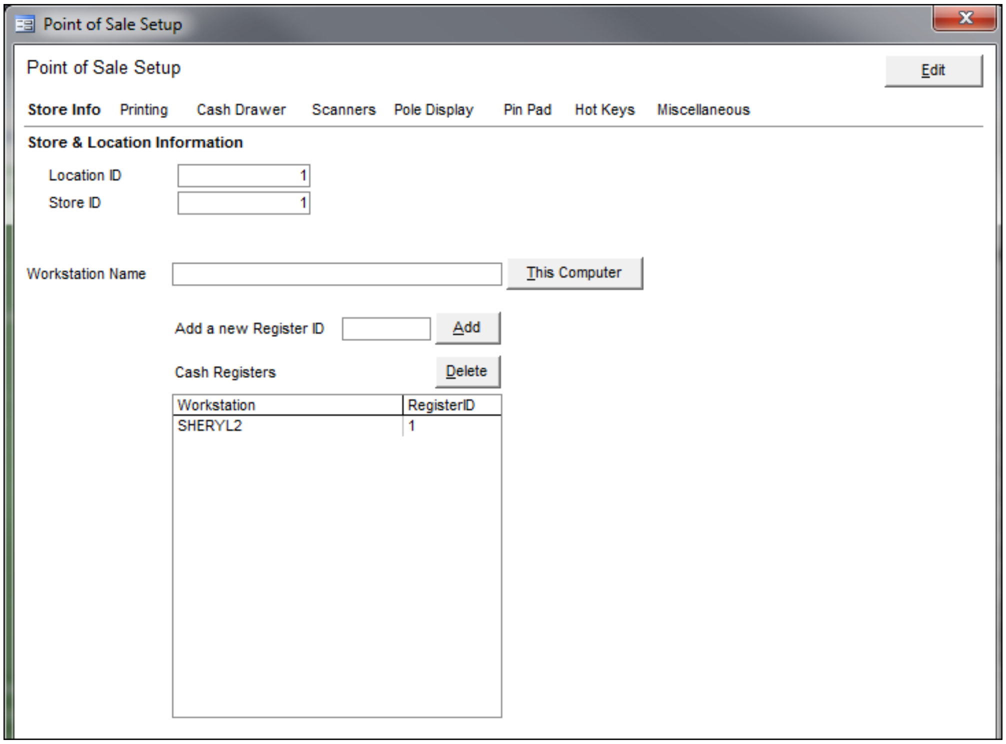
Pin Pad - not currently supported

Hot Keys

Miscellaneous

Store Info Tab

On the **Store Info** tab, identify the workstations which are used for POS sales, and their physical locations:



Location ID –. This field is not editable at this screen, but is set by system parameter **POSLocationID**. It is for future development of the program to identify the different locations to a central back office system that processes data from all of the brick and mortar store locations.

Store ID – Because The Stone Edge Order Manager is capable of supporting multiple data files (i.e., stores) at a single physical location, a unique **Store ID** must be specified for each data file. Assign a Store ID by setting system parameter **POSStoreID**.

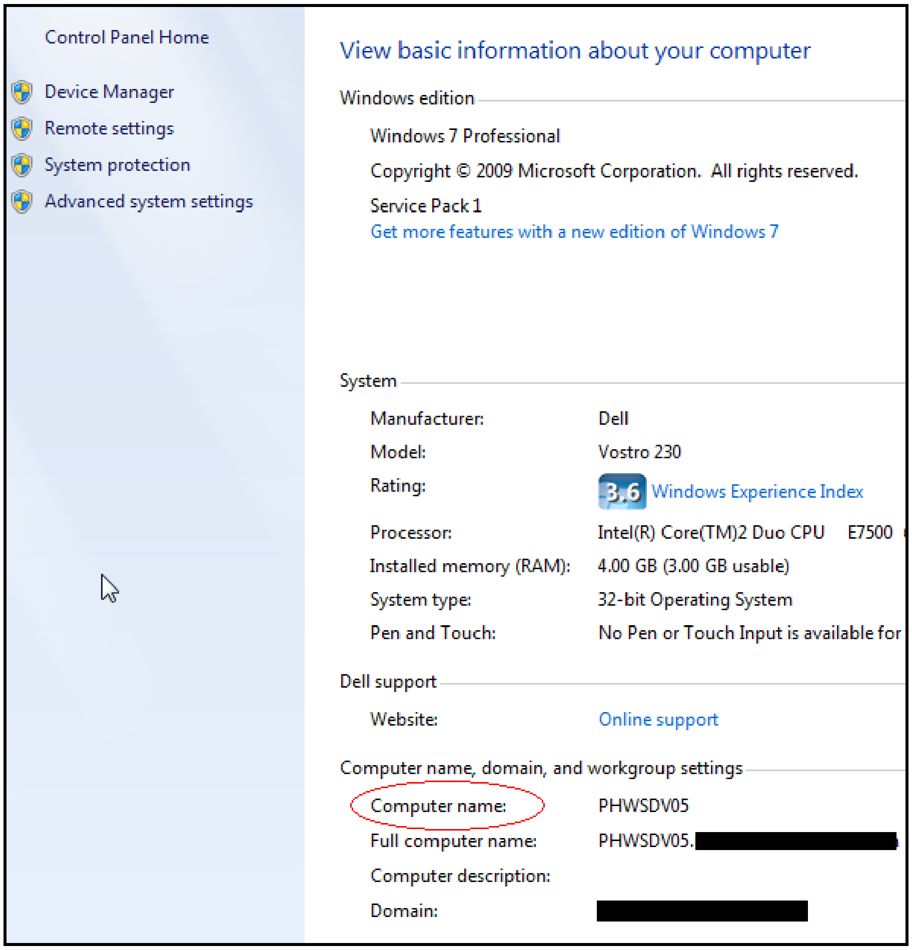
Note: *The reason for having separate data files is so you can run two or more distinct businesses within the same instance of The Stone Edge Order Manager. That also applies to the POS system (one physical location selling products for two or more separate businesses). Although it is **not typical** and **not generally recommended**, it is possible to use multiple data files with the POS interface.*

Adding and Editing Cash Registers

Each workstation using the POS interface must be assigned a **cash register number** for reporting purposes. Complete the following steps to add cash registers to the current store file:

1. Go to **Main Menu > Settings > System Functions > Point of Sale Setup**. The **Store Info** tab on the **Point of Sale Setup** screen is displayed. Refer to the image in the previous section.
2. Enter the **Workstation Name** of the computer that is being set up. To get the computer name of the current workstation, click **This Computer** and The Stone Edge Order Manager automatically fills in the name. Continue with the step 3.

   To enter settings for other workstations from the current workstation, you must first obtain their computer names from the *Computer Name* tab of the System Properties window found in the System section of the Control Panel on each workstation:



Type the computer name of the other workstation in the **Workstation Name** field.

3. Enter a **Register ID**. This is an arbitrary number chosen by you. Be sure that each POS workstation has a unique Register ID number in each store data file used at the physical location.

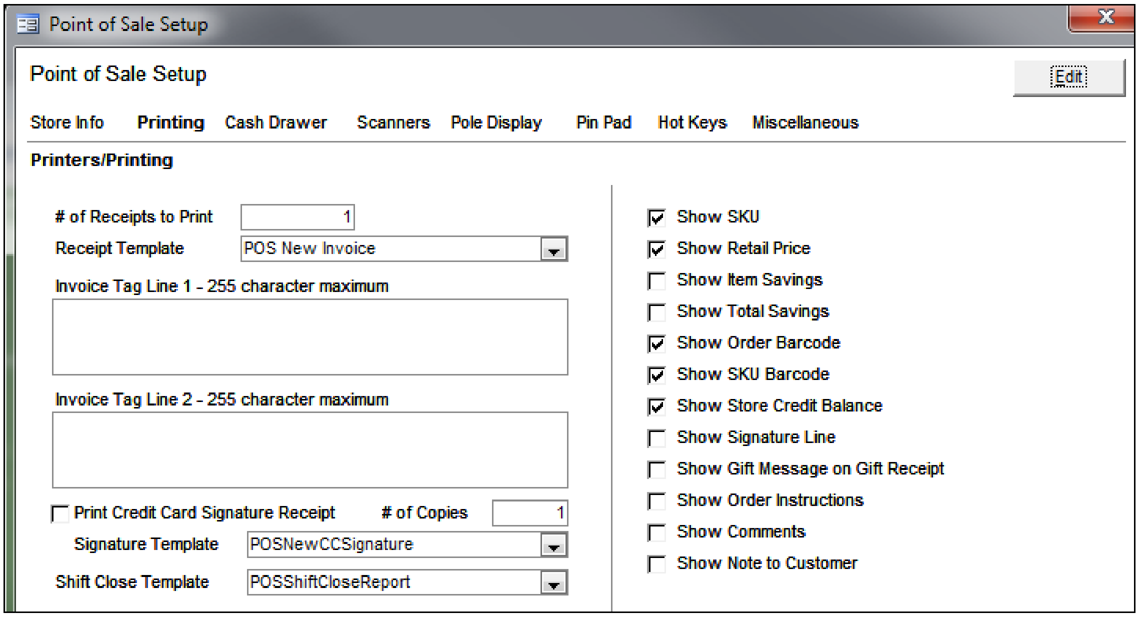
4. Click the **Add** button. The system adds the **Workstation** name and **Register ID** to the list of **Cash Registers**.

- To remove a workstation/register association, select it from the **Cash Registers** list and click the **Delete** button.

- An existing cash register's configuration can be edited by re-entering the **Workstation name**, entering a new Register ID and clicking **Add.** The workstation is assigned the new Register ID.

Printing Tab

Use the **Printing** tab to configure receipt printing options for POS orders:



Complete the following steps to configure the store's POS printing settings:

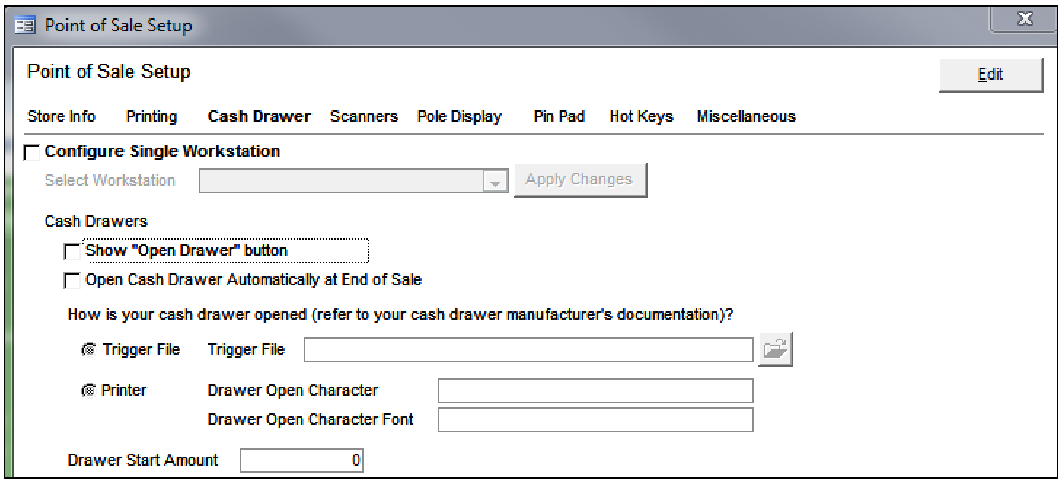
1. Go to **Main Menu > Settings > System Functions > Point of Sale Setup** and select the **Printing** tab on the **Point of Sale Setup** screen.
2. Click the **Edit** button to unlock the screen.
3. Enter the **# of Receipts to Print** when an order is paid or saved.

   Receipt Template should have **POS New Invoice** selected. The Stone Edge Order Manager prints the selected number of receipts using the designated template upon completion of each POS order. Templates are designed for standard 3-inch receipt paper and options can only be viewed with data from an actual or test order.
4. Enter messages to print on all POS invoices (receipts) in the **Invoice Tag Line 1** and **Invoicing Tag Line 2** fields.
5. Choose whether to **Print a Credit Card Signature Receipt** when applicable.
6. Enter the **# of Signature Copies** to print when an order is paid by credit card. If 2-ply paper is being used, select 1 copy. If using single-ply paper, select 2 copies. Templates are designed for standard 3-inch receipt paper and options can only be viewed with data from an actual or test order.
7. The default **Signature Template** should have **POSNewCCSignature** selected.
8. Select a **Shift Close Template** from the drop-down list to determine the report that prints when each worker's shift ends. The **POSShiftCloseReport** template is designed for standard 3-inch receipt paper and the **POSShiftCloseReport 8x11** template is designed for standard 8.5 x11-inch paper. Template options can only be viewed with actual, or test data from a shift close.
9. Use the check boxes on the right-hand side of the screen to include other fields on POS Invoices.
10. Click the **Save** button.

Cash Drawer Tab

The **Cash Drawer** tab is can be used to configure settings for a single workstation, or for all workstations. Opening a cash drawer can be triggered a number of ways, the most popular being when the receipt prints. In that case, the printer driver triggers the drawer to open at the start or end of the print job. If the cash drawer connects directly to the PC via a Serial Port or USB Port and requires that a "trigger file" is executed in order for the drawer to open, The Stone Edge Order Manager can run the executable automatically after each receipt is printed.

Stone Edge Technologies only provides technical support for configuring those brands of cash drawers and receipt printers that are mentioned in our Knowledge Base, as they are the only ones that have been tested with the program. The Stone Edge Order Manager may or may not work with other vendor's devices. If you already have a receipt printer and cash drawer from another source, obtain the manufacturer's documentation for each device (printer and cash drawer) and attempt to follow the steps outlined in our documentation to determine if the device will work with The Stone Edge Order Manager.



Complete the following steps to configure **Cash Drawer** settings:

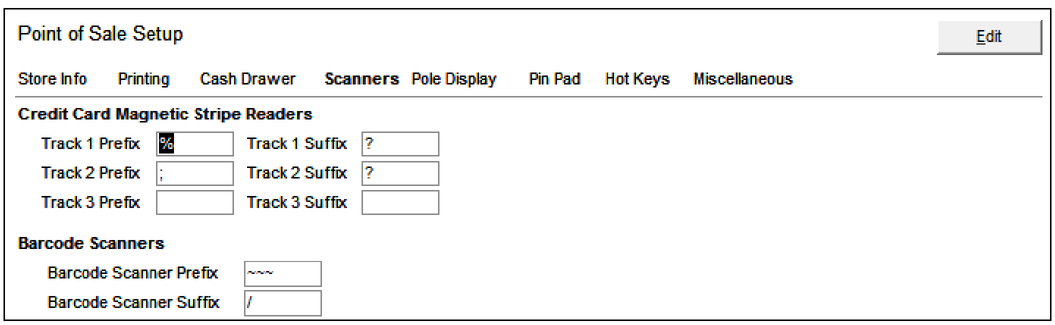
1. Go to **Main Menu > Settings > System Functions > Point of Sale Setup.** On the **Point of Sale Setup** screen, select the **Cash Drawer** tab.
2. Click the **Edit** button to unlock the screen for data entry. At least one workstation and register must have been defined on the Store Info tab prior to setting up a cash drawer. See the Store Info tab earlier in this chapter for details.
3. Enter the cash drawer settings for all workstations (skip to step 4), or select the **Configure Single Workstation** check box to enter settings for a specific workstation. Choose the workstation name from the **Select Workstation** drop-down list.
4. Select whether to **Show the "Open Cash Drawer" button** on the POS screen. If checked, the cash drawer can be opened without a making a sale.
5. Select whether the system should **Open the Cash Drawer Automatically at End of Sale**.
6. If a **Trigger File** is required to open the drawer, enter its path or click the **Folder** icon to locate it. This field should only be filled in if using a device that is directly connected to the computer rather than through a printer.
7. If the cash drawer only opens when a specific character/font is printed, enter the **Drawer Open Character** and **Drawer Open Character Font** in the fields provided. These fields only need to be completed if the cash drawer is connected to a printer rather than being directly connected to the computer. The printer triggers the drawer to open when a specific character is printed. Refer to the printer's documentation to determine the correct values to enter here.

Note: Although this method can be used with Stone Edge, Stone Edge Technologies does not recommend using such a configuration. It is much simpler to connect the cash drawer directly to the workstation.

8. Enter a default **Drawer Start Amount** to reconcile the money in the register at the end of a shift. The value that is entered here sets the main system parameter **DrawerStartAmount**. Although the program has workstation-based Special Parameters for **DrawerStartAmount**, do not use them at this time.
9. If a single workstation was configured, click the **Apply Changes** button now to save the settings for that register and select another workstation to configure.
10. Click the **Test Drawer** button to verify the settings for the Cash Drawer. After making changes to the settings of a Cash Drawer, click the **Apply Changes** button to save the changes before clicking the **Test Drawer** button or the original drawer settings will be tested. Do not click the **Test Drawer** button unless the device is physically connected to a printer or the workstation.
11. When finished making all changes, click the **Save** button to lock the Cash Drawer tab.
12. Use the red X in the upper right-hand corner to exit the POS Setup screen.

Scanners Tab

Use the **Scanners** tab to configure barcode and credit card scanners. The Stone Edge Order Manager requires “prefix” and “suffix” characters at the beginning and end of each scan or swipe, so it knows which device has been used. Most barcode scanners and credit card readers can be programmed with a prefix and suffix.



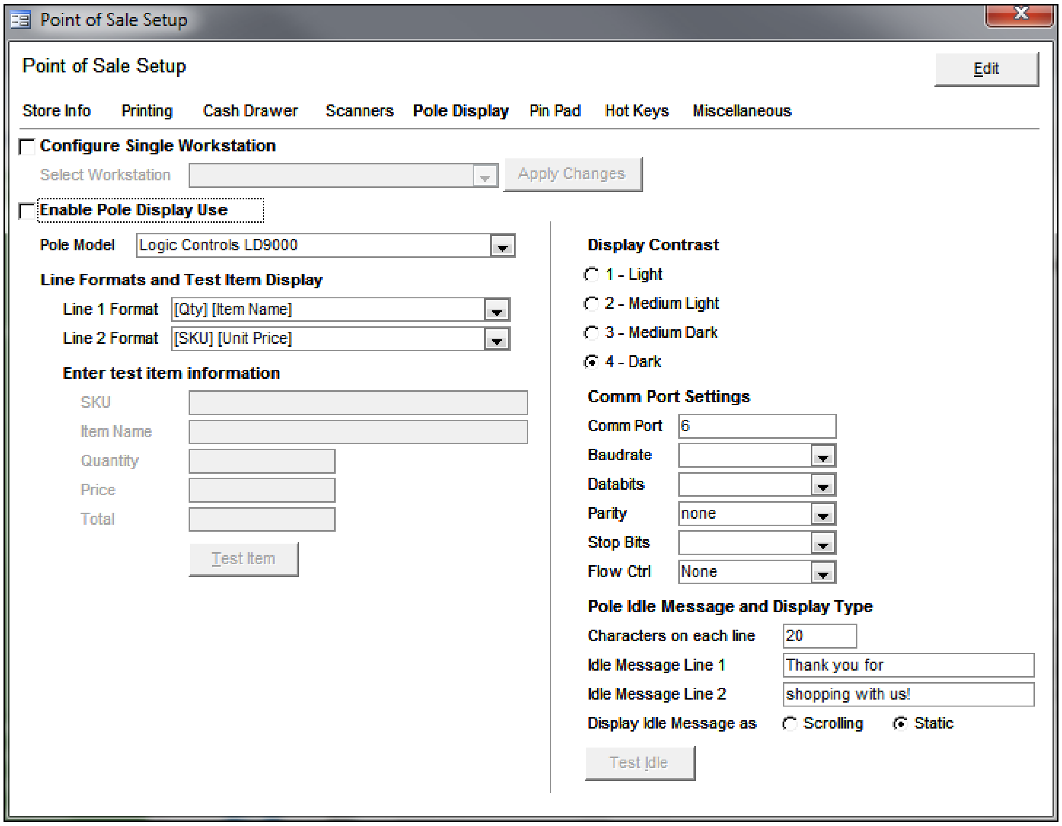
To enter the scanners’ prefixes and suffixes:

1. Go to **Main Menu > Settings > System Functions > Point of Sale Setup**.
2. Select the **Scanners** tab, and click the **Edit** button to unlock the window for editing.
3. Enter the **Prefixes** and **Suffixes** which are used by a Credit Card Reader and/or Barcode Scanner into the appropriate fields. Consult the documentation provided with the hardware and refer to the *Knowledge Base* for more detailed instructions.

Note: *While most manufacturers devices may work with The Stone Edge Order Manager, Stone Edge Technologies does not provide technical assistance for configuring hardware other than the types that are listed as supported devices in our online Knowledge Base.*

Pole Display Tab

The **Pole Display** tab is used configure pole displays used at POS checkout workstations.



Complete the following steps to configure **Pole Display** settings:

1. Go **Main Menu > Settings > System Functions > Point-of-Sale Setup**, and select the **Pole Display** tab.
2. Click the **Edit** button to unlock the window to allow data entry.
3. Set the pole display settings for all workstations (skip to step 4), or select the **Configure Single Workstation** check box. Then choose the workstation name from the **Select Workstation** drop-down list.
4. Select the **Enable Pole Display Use** check box, and select a **Pole Model** from the drop-down list.
5. Select the data to display on the pole from the **Line 1 Format** and **Line 2 Format** drop-down lists.
6. To test your pole display, enter the fields of the **Enter test item information** area and click the **Test Item** button. The pole display shows the data that was selected in step 5.
7. Select the **Display Contrast** by clicking one of the radio buttons.
8. Enter the **Comm Port Settings** by selecting them from the drop-down lists. Consult the hardware manufacturer's documentation.
9. Enter a message in the **Pole Idle Message and Display Type** fields to be displayed when no order is in progress. Select whether the idle message is to be **Scrolling** or **Static**.
10. If only a single workstation was configured, click the **Apply Changes** button to save the settings for that register and select another workstation to configure. Otherwise, skip to step 11.

11. When finished, click the **Save** button to retain the changes and re-lock the form.

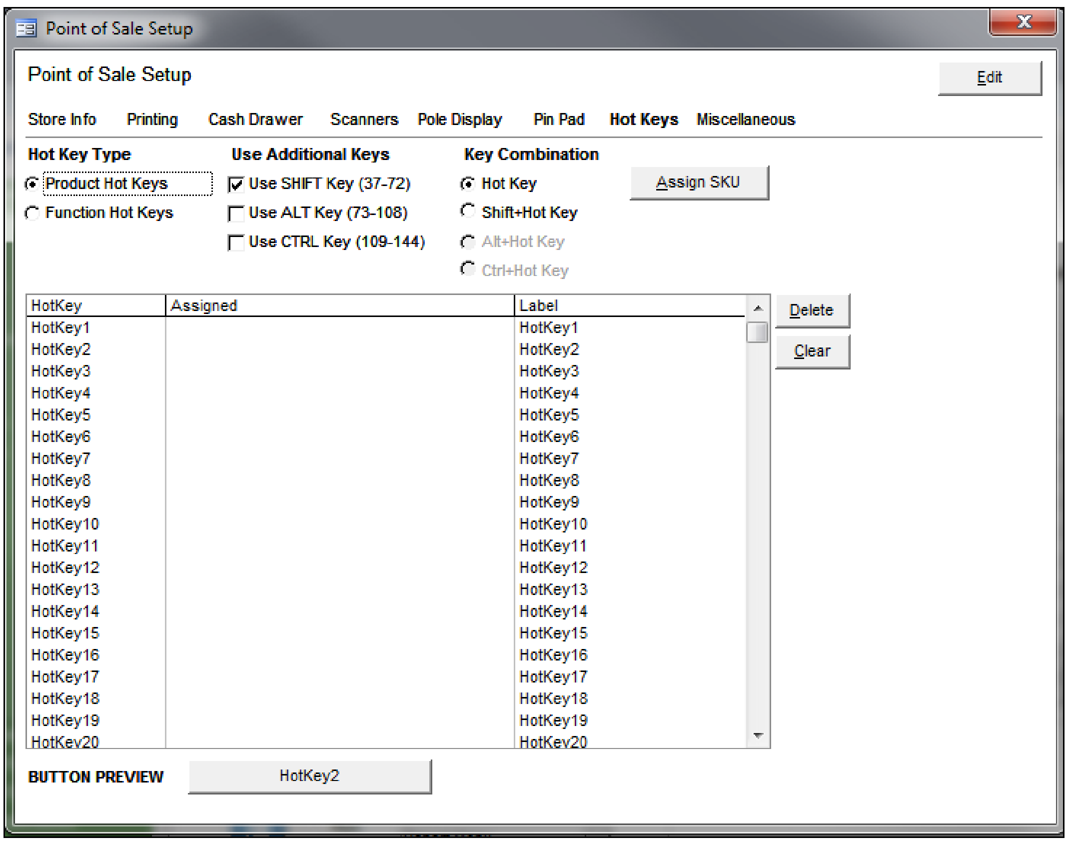
Pin Pad Tab

Note: *Pin Pads are not supported by The Stone Edge Order Manager 7.0 PIN pads are supported in Stone Edge V7.1, however.*

Hot Keys Tab

Hot Keys are user-modifiable buttons which can be configured for one-touch access to functions and products. Use the **Hot Keys** tab on the **Point of Sale Setup** screen to assign products and functions to the hot keys displayed on the POS interface.

To access the **Hot Keys** tab, go to the **Main Menu > Settings > System Functions > Point-of-Sale Setup**, and select the **Hot Keys** tab. Click the **Edit** button to unlock the screen and allow data entry.



There can be up to 48 hot keys visible on the POS interface at any one time:

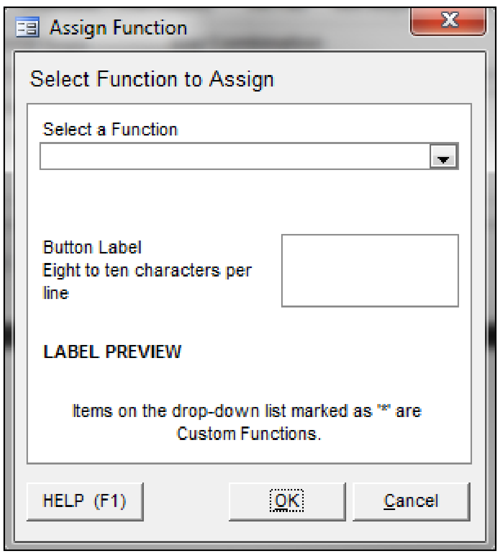
- 12 **Function Hot Keys** along the left side of the POS screen are pre-defined**.**
- 36 **Product Hot Keys** on the Hot Keys tab of the POS screen are not defined by default.

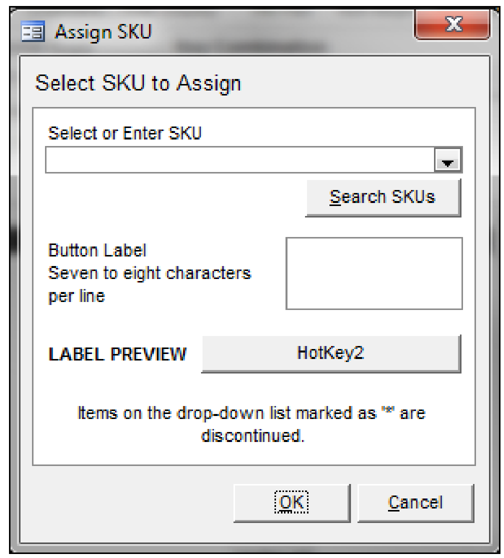
In total, up to 48 **Function Hot Keys** and 144 **Product Hot Keys** (accessible by pressing the **Shift**, **Ctrl**, or **Alt** keys) can be programmed. For example, the default POS interface displays buttons F1 through F12. Press the **Shift** key to see buttons 13 through 24, the **Ctrl** key to see buttons 25 through 36, and the **Alt** key to see buttons 37 through 48. All of the function and product hot keys are assigned using the **Hot Keys** tab. (Refer to ***Function Hot Keys***, later in this chapter, for more information about the preset **Function Hot Keys**.)

Assigning Hot Keys for the POS Interface

There are **Function Hot Keys** that perform common actions, such as opening the customer lookup screen or printing a gift receipt, and there are also **Product Hot Keys** that can add specific products to the current order. In both cases the keys can be used by themselves, or in combination with the **Shift**, **Control** or **Alt** key.

1. Go to **Main Menu > Settings > System Functions > Point-of-Sale Setup** and select the **Hot Keys** tab.
2. Select the **Hot Key Type** (Product or Function) to be assigned.
3. Check the **SHIFT**, **CTRL** and/or **ALT** check boxes under **Use Additional Keys** to enable those additional key combinations.
4. Select which **Key Combination** to use.
5. Click the **Assign Function** or **Assign SKU** button. The system displays the **Select Function to Assign** or **Select SKU to Assign** window.





6. Choose from the functions in the **Select a Function** drop-down list or a product SKU from **Select SKU to Assign** drop-down list.

Note: *The* ***Select a Function*** *drop-down contains a total of 14 function options: the 12 functions preset on the Point of Sale interface and two additional function options. Users with advanced programming skills can program their own functions for the POS interface and add them to the Select a Function drop-down list (see the* ***Knowledge Base*** *article,* ***Point of Sale Setup – Hot Keys Tab*** *for more information.) Users can also enlist Stone Edge Professional Services to create custom functions. Contact Stone Edge Technologies for availability and cost information.*

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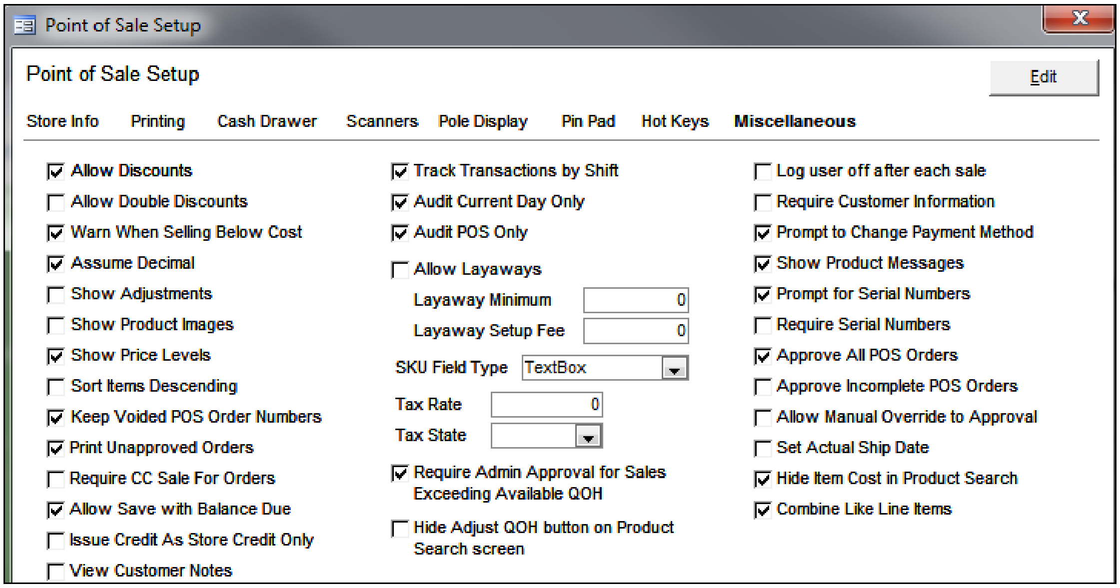
7. The **Button Label** field contains the name of the selected function by default, but you can enter a different value that will be displayed on the button on the POS screen. The **LABEL PREVIEW** displays how the hot keys look on the POS Form.
8. Click the **OK** button. The system adds the assignment to the list of hot keys.

Refer to the ***Knowledge Base*** online for more information on configuring hot keys.

Miscellaneous Tab

The **Miscellaneous Tab** covers a host of additional settings for the POS system. To access the **Miscellaneous** tab, go to the **Main Menu > Settings > System Functions > Point-of-Sale Setup**:



How these settings are configured depends on how the POS system is used in your environment. For example, if you have a large inventory database, you may want to set the **SKU Field Type** to a **TextBox** rather than the default **Combo Box**. Refer to the ***Knowledge Base*** online for more information about **Miscellaneous Tab** options.

Using the POS System

The **POS (Point of Sale)** system allows The Stone Edge Order Manager to function as a “virtual cash register” for merchants who have physical stores with walk-in customers.

This section includes the following topics:

Around the POS Interface

Function Hot Keys

Item Details Area

Additional Functions

Entering Line Items

Entering or Editing Customer Information

Discounts and Coupons

Taking Payment for an Order

Returning an Item

Store Credit

Putting an Order on Hold

Recalling an Order

Reprinting a Receipt

Printing a Gift Receipt

Creating a Special Order

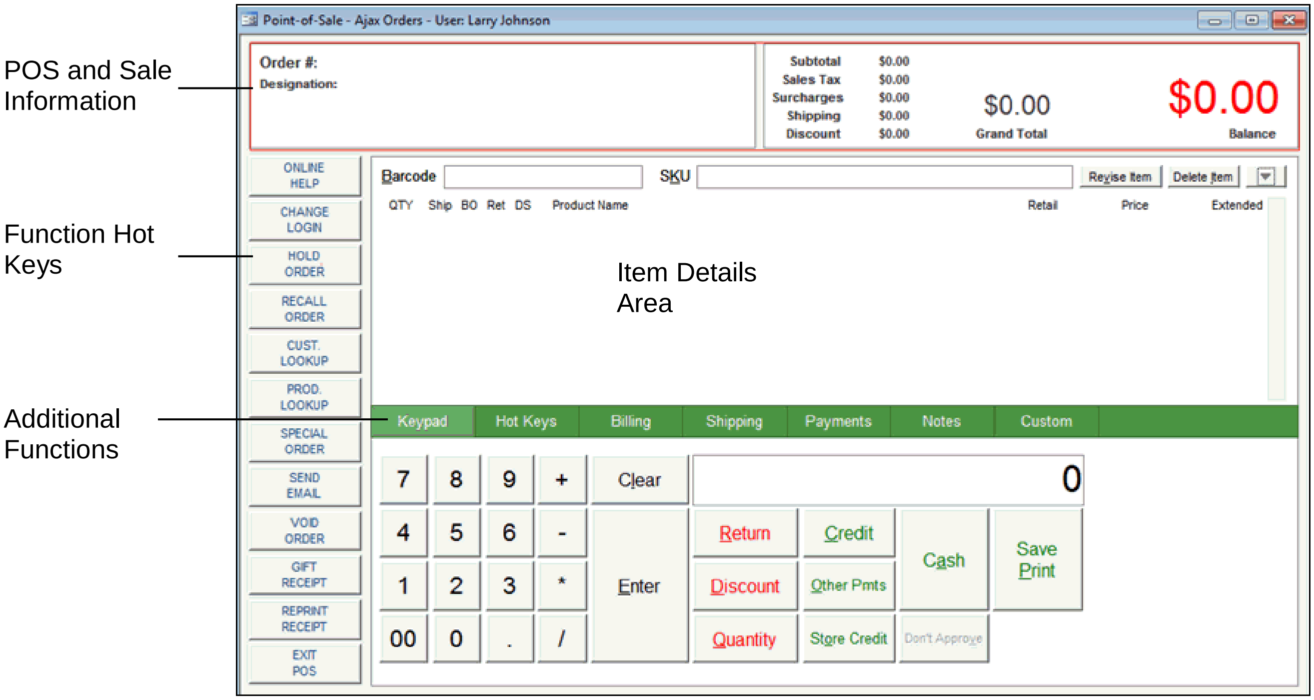
Voiding an Order

Ending a Shift

Around the POS Interface

__Note:__ The Stone Edge POS system has been optimized for use with a touch-screen monitor, but it can be used with a regular monitor, mouse and keyboard. The program should work with any Windows-compatible monitor.

To access the Point of Sale interface, go to **Main Menu > Create a New Order > Point-of-Sale.** The system displays the **POS Form**:



The POS Form is divided into the following sections:

POS and Sale Information –Displays the user currently logged into the POS, the order number and order type, and the various charges for the order. The system also indicates the number of orders on hold at that particular workstation, under the user's name.

Function Hot Keys – The 12 function buttons are programmable "hot keys" that execute specific functions at the POS screen. Refer to ***Function Hot Keys***, below, for more information on these keys.

Item Details – After an item is added to the current order, the details are displayed in this section of the screen.

Additional Functions – Keypad, Hot Keys, Billing, Shipping, Payments, Notes, Custom tabs. Use the Keypad to enter order information and the Hot Keys tab to access additional keys you programmed. The other tabs display additional order information.

Function Hot Keys on the POS Screen

There are 12 Function Hot Keys that are pre-programmed in the POS interface. Click a button or press a Function buttons on the keyboard (F1–F12). There are 36 additional Function Hot Keys that can be programmed. These additional keys are visible on the POS by pressing **Shift**, **Ctrl**, or **Alt** keys. Refer to ***Assigning Hot Keys for the POS Interface***, earlier in this chapter, for information about programming these keys.

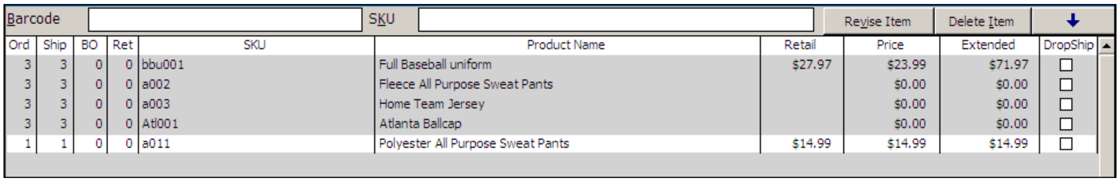
The 12 default Function Hot Keys are described below:

Hot Key	**Function**
Online Help	This button opens Stone Edge's Online Help system to the POS page.
Change Login	Allows a new user to log into The Stone Edge Order Manager, while remaining in the POS interface. Refer to ***Logging in to The Stone Edge Order Manager***, in Chapter 2, for more information on logging in as a new user.
Hold Order	This puts the current order "on hold" so other orders can be processed at the current POS workstation. Use the Recall Order function to re-load an order that has been placed on hold. Refer to ***Putting an Order on Hold***, below, for more information.
Recall Order	Click this button to recall an order to the POS interface. Refer to ***Recalling an Order***, below, for more information.
Cust. Lookup	This opens the customer search window where criteria can be specified to locate an existing customer record. Refer to ***Searching for a Customer***, below, for more information.
Prod. Lookup	This opens the **Find a Product** window to search for a particular product from the store's inventory. Refer to ***Searching for Items to View***, below, for more information.
Special Order	This allows you to designate the current order as a **Sale**, **Quote**, **Layaway**, or **On Hold**. It is possible to create and add custom designations to that list. Refer to ***Creating a Special Order***, below, for more information.
Send Email	This button sends an email message to the selected customer. Refer to ***Sending Email to a Customer***, below, for more information.
Void/Clear	Press this button to void the current unsaved order and clear the POS screen or to exit from a recalled order without saving any changes made to the order and remove it from the POS screen. Refer to ***Voiding an Order***, below, for more information.
Gift Receipt	This button allows an order to be recalled and print a gift receipt for it. Refer to ***Printing a Gift Receipt***, below, for more information.
Reprint Receipt	Press this button to reprint a receipt for an order. Refer to ***Reprinting a Receipt***, below, for more information.
Exit POS	Clicking this button exits the POS interface and returns to The Stone Edge Order Manager's Main Menu, or it exits the The Stone Edge Order Manager program entirely if the current workstation has been designated for POS use only.

Note: *The Stone Edge Order Manager contains a total of 14 function options: the 12 functions preset on the Point of Sale interface and two additional function options. Users with advanced programming skills can program their own functions for hot keys on the POS interface (see the* ***Knowledge Base*** *article,* ***Point of Sale Setup – Hot Keys Tab*** *for more information.) Users can also enlist Stone Edge Technologies Professional Services to create custom functions. Contact the Sales Department for more information.*

Item Details Area of the POS Screen

Just below the Function Hot Keys on the POS interface is where the line items for the current order are displayed. The **Item Details** area contains the quantity ordered (**Ord**), quantity shipped (**Ship**), quantity back-ordered (**BO**), quantity returned (**RET**), the SKU, the product name, price information and whether or not the item is to be drop-shipped. The **Ship** column indicates the quantity the customer is receiving. Generally, only “in stock” items are sold at the POS, but items can be backordered for a customer here as well.

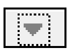


Ord	Ship	BO	Ret	SKU	Product Name	Retail	Price	Extended	DropShip
3	3	0	0	bbu001	Full Baseball uniform	$27.97	$23.99	$71.97	☐
3	3	0	0	a002	Fleece All Purpose Sweat Pants		$0.00	$0.00	☐
3	3	0	0	a003	Home Team Jersey		$0.00	$0.00	☐
3	3	0	0	Atl001	Atlanta Ballcap		$0.00	$0.00	☐
1	1	0	0	a011	Polyester All Purpose Sweat Pants	$14.99	$14.99	$14.99	☐

The **Barcode** and **SKU** fields are populated when a product UPC is scanned at the POS screen. It is not necessary to have the cursor in the Barcode field when the item is being scanned, if the barcode scanner is programmed correctly. Refer to the Knowledge Base for information about configuring barcode scanners for use with Stone Edge. You can also manually type the Barcode or SKU into the appropriate field.

The **Revise Item** button allows you to make changes to the selected line item (highlighted in white), such as the quantity ordered, whether to place a back order or drop-ship the item, the item status, or change an option.

The **Delete Item** button removes the selected line item from the order.

The  button hides or un-hides the **Additional Functions** section of the POS screen.

Additional Functions of the POS Screen

The bottom portion of the POS screen contains seven tabs with various additional functions. These tabs are defined below:

Keypad – This tab can be used for data entry. Key numbers and quantities, select a discount, issue a store credit, enter an item to return, and accept payments. Refer to ***POS Keypad***, later in this chapter, for more information.

Hot Keys – This tab contains any Product Hot Keys that may have been defined during POS Setup. Refer to ***Assigning Hot Keys for the POS Interface***, earlier in this chapter, for more information.

Billing – This tab displays the billing name and address for the current order. To add or change customer billing information, refer to ***Entering or Editing Customer Information****,* later in this chapter.

Shipping – This tab shows the shipping name and address for the current order. To add or change customer shipping information, refer to ***Entering or Editing Customer Information****,* later in this chapter.

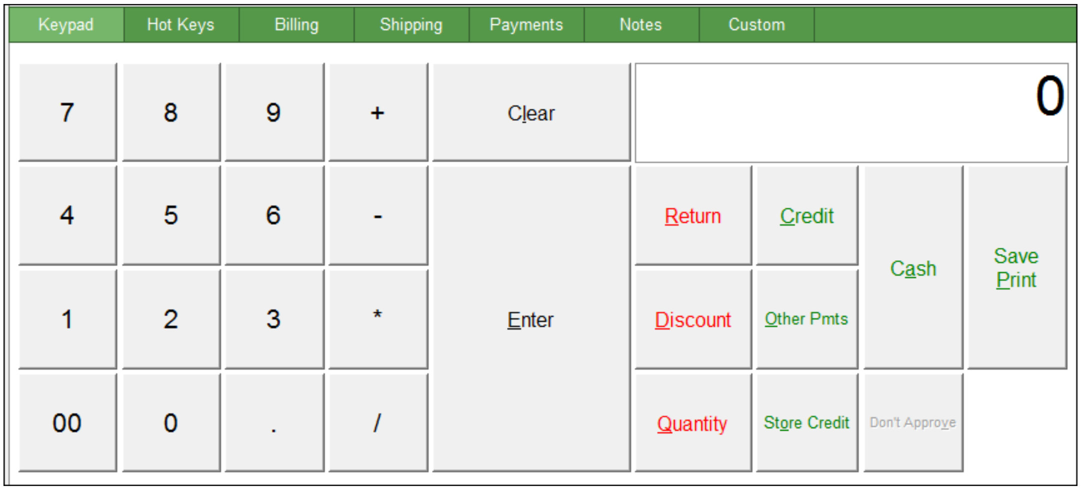
Payment – View, Edit, Capture or Void, payment, credit card authorization and/or transaction information for the order. A **PO#** and **PO Terms** can also be entered if the customer is paying by Purchase Order. PO Terms must be pre-defined by you at the **List Maintenance** screen (**Main Menu > Settings > Data Functions > List Maintenance >Payment Terms**). See the section entitled, *List Maintenance,* in Chapter 2 for more information. It is necessary to select a transaction before clicking one of the action buttons.

Notes – Any notes associated with the order can be viewed or edited at this tab. Enter a gift message to be printed on a gift receipt, enter order instructions, comments or customer notes here.

Custom Fields – Enter data for any custom Order fields that have been created. Refer to ***Managing Custom Fields***, in Chapter 2, for more information on defining these fields.

POS Keypad

The **Keypad** is the default tab of the Additional Functions section of the POS Interface, where quantities, payments, discounts, etc., can be entered.



The keys to the left allow you to enter numbers for payments, quantities, and discounts. It also serves as a rudimentary calculator for basic mathematic functions (+, -, *, /). There is also an area (not pictured) where the product image can appear as each item is scanned.

The table below describes the buttons on the **Keypad** tab:

Button	Function
Return	Use this button if a customer wants to return an item or an entire order. Refer to ***Returning an Item*** for more information.
Discount	Click this button to enter a discount for the item or order. Refer to ***Discounts and Coupons*** for more information.
Quantity	This button allows a quantity to be entered for a line item. Refer to ***Entering a Quantity for a Line Item*** for more information.
Credit	Use this to take a payment via credit card (without a card reader installed). Refer to ***Taking a Credit Card Payment*** for more information.
Other Pmts	Use this button to take a check or other form of payment. Refer to ***Taking a Check or Other Form of Payment*** for more information.
Store Credit	This button allows the customer's store credit to be used for a payment. Refer to ***Store Credit*** for more information.
Cash	This button accepts a cash payment for the order. Refer to ***Taking a Cash Payment*** for more information.
Save Print	This button saves the current order and prints receipts for it.

Entering Line Items

Items can be entered at the POS screen in any of the following ways:

- Scan the product **Barcode** using a barcode reader.
- Enter a **SKU** or **Barcode** and press **Tab** or **Enter.**
- Click the **Prod. Lookup** function key to search the product database and add a product. The system displays the **Find a Product** window. (Refer to ***Searching for Items to View*, **in Chapter 3, for more information on selecting an item using this window.)

  ***Note:** The **Prod. Lookup** button is a preset Function Hot key on the POS interface. If this function key is not visible, the hot keys may have been changed from the default settings mentioned in this document. Try pressing Shift, Ctrl, or Alt on the keyboard to display a different set of function keys. For more information, see **Function Hot Keys,** earlier in this chapter.*

- Click a **Product Hot Key** on the **Hot Keys** tab to add an item to the current order. (See ***Assigning Hot Keys for the POS Interface***, earlier in the chapter, to learn how to set up Product Hot Keys.)

Entering the Quantity for a Line Item

When selling multiple quantities of the same item, instead of scanning or entering each piece separately, enter a quantity *first*, and then enter the product by scanning the barcode, entering a SKU, clicking a hot key, or searching the product database for it.

Complete the following steps to enter multiple quantities of a line item:

1. Enter the desired quantity by typing the value on the keyboard or by clicking the number on the Keypad.
2. Then click the **Quantity** button on the Keypad. The system indicates the quantity entered in the POS and Sale Information areas.
3. Enter the product by scanning the Barcode, entering its SKU, pressing a hot key, or searching the product database.

The system adds the selected item to the **Item Details** area of the POS screen in the specified quantity. The **Extended** column reflects the Qty x Price. The quantity can also be changed after adding a product by clicking the **Revise Item** button.

Editing (Revising) Line Items

Line items can be edited once they have been entered into the POS screen.

Complete the following steps to make changes to a line item on a POS order:

1. Select the line item to be edited by clicking it in the **Item Details** area of the POS screen. The item highlighted in white is the currently selected item.
2. Click the **Revise Item** button.
3. Edit the **Product SKU Description**, **Quantity Ordered**, or **Price per unit** fields.
4. Set the **Status** of the line item, if desired, by selecting a pre-defined status from the drop-down list.
5. Check the appropriate box if a line item should be **Back Ordered** or **Drop-Shipped**.
6. If a drop-shipped item has more than one **Supplier**, select the supplier to order it from in the drop-down **Supplier** list.

7. The Freeform and Option fields 1-10 can be used by the merchant to manually record option information in the fields of the same name in the order.
8. When finished, click **OK**.

The system displays the POS screen with the changes made to the selected line item.

Deleting Line Items

Complete the following steps to delete a line item from the current order:

1. Select the line item to delete by clicking it in the **Item Details** area of the POS screen. The item highlighted in white is the currently selected item.
2. Click the **Delete Item** button. The system prompts for confirmation.
3. Click **Yes**.

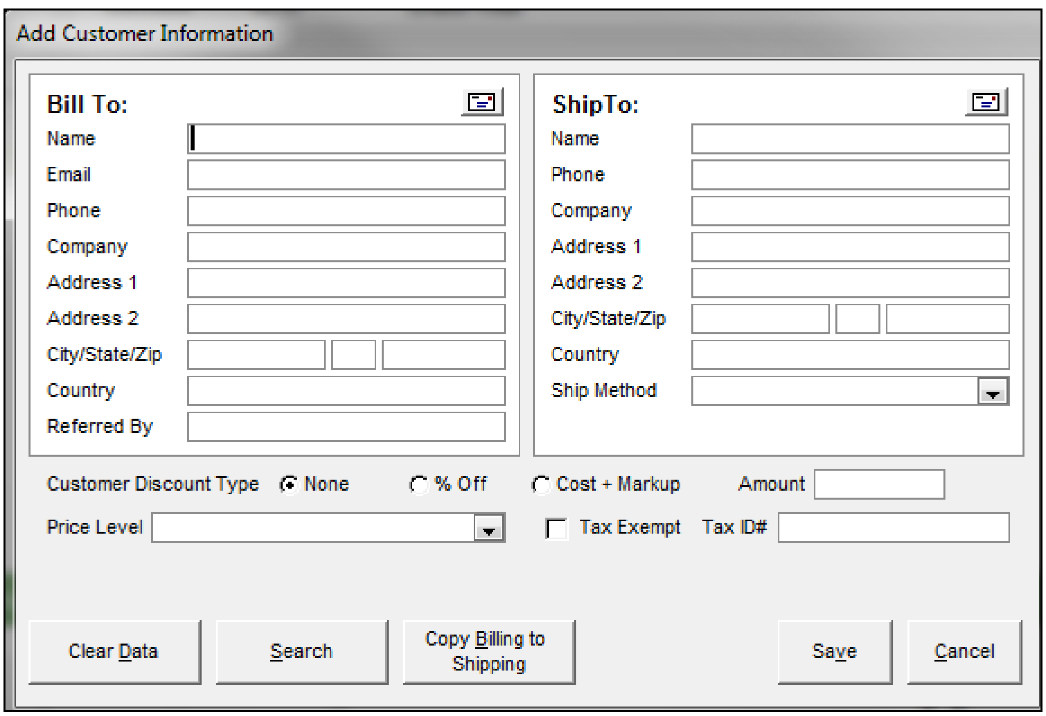
The system deletes the selected line item and re-calculates the totals for the order.

Note: *To delete line items from a recalled order, see* ***Deleting a Line Item from a Recalled Order****, later in this chapter.*

Entering or Editing Customer Information

When an order is entered at the POS screen, it is generally not necessary to enter the customer's billing and shipping information. However, if the customer's purchase is back ordered, or if you want to keep customer records for orders at the POS, it is possible to use the program to record customer information.

Complete the following steps to enter customer information at the POS:



Note: *If the order already has customer information, this window is titled* ***Edit Customer Information****.*

1. On the POS screen, click the **Cust. Lookup** hot key.

Note: *The* ***Cust. Lookup*** *button is a preset Function Hot key on the POS interface. If this function key is not visible, the hot keys may have been altered from the default settings described in this document. Try pressing Shift, Ctrl, or Alt on the keyboard to display a different set of function keys. For more information, see* ***Function Hot Keys,*** *earlier in this chapter.*

2. Manually enter a new customer's information, enter part of an existing customer's information and hit the Tab or Enter keys, or click the **Search** button to look for an existing customer record. The system displays the **Search for a Customer** window. Refer to Chapter 5, *Searching for a Customer,* for more information about using this screen. Enter the search criteria and select the appropriate customer record from the search results window.
3. Optionally, select a **Customer Discount Type** or indicate **Tax Exempt** status for the customer.
4. Click the **Save** button and the customer information will be added to the **Billing** and **Shipping** tabs.

The **Clear Data** button erases all data from the form, as well as any customer data that has been previously saved in the order (the Billing and Shipping tabs).

The **Copy Billing to Shipping** button copies the billing address of a customer record to the shipping information fields for the order.

Discounts and Coupons

In addition to editing the price of an item, the POS interface allows a discount to be entered for a line item or for the entire order by using the **Discount** button on the Keypad tab. Discounts are generally based on the price of an item or the entire order. A **flat discount** is a dollar amount that will be taken off the order or item. A **percentage discount** takes a percentage off the price of the order or item. Coupons, on the other hand, can only be applied at the order level, not at the line item level.

Order Discounts – Apply a flat or percentage discount to the order. Coupons can also be applied to an order or it is possible to see if there is any automatic discount.

Item Discounts – Apply a flat or percentage discount to any item in the order.

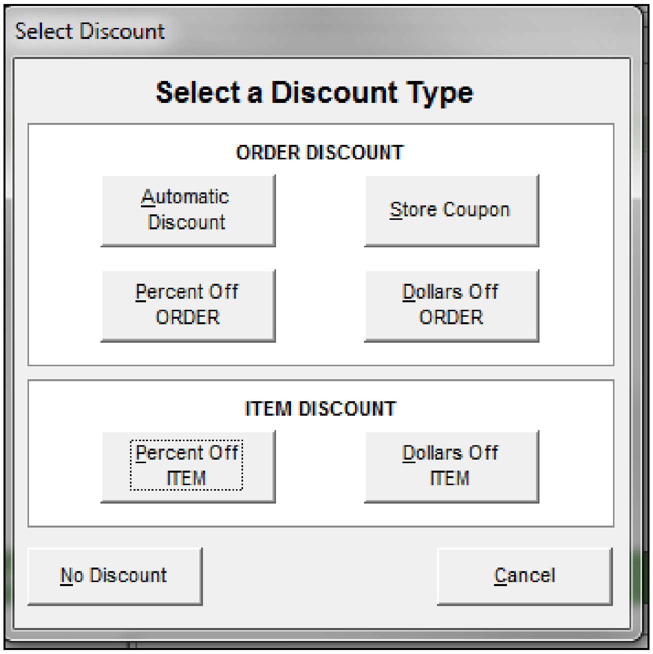
Coupons – A coupon is a pre-defined discount that can only be applied against an entire order. Coupons usually have a limited date range during which they can be used.

Entering a Discount

Complete the following steps to enter a discount for an order:

1. For an item discount, select the line item by clicking it.
2. Enter the amount of the discount using the **Keypad** or keyboard. This value should be an integer that corresponds to the flat dollar amount or the percentage of the discount.

3. Click the **Discount** button. The system displays the **Select a Discount Type** window:

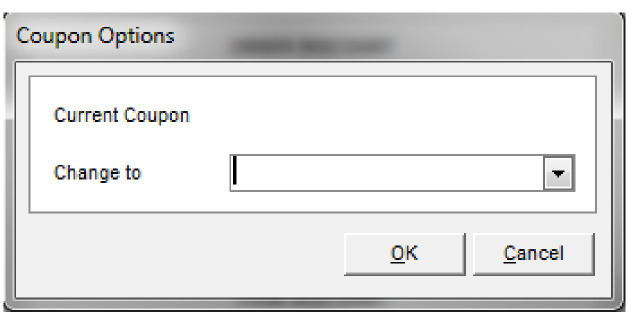


4. Click the button that corresponds to the type of discount to be applied.
5. The system applies the discount to the item or order. The total of all discounts applied to the order appears in the **POS and Sale Information** area.
6. To remove the discount or coupon amount from the order, click the **Discount** button. On the **Select a Discount Type** window, click **No Discount.** The system restores the order or item amount to the original price.

Entering a Coupon

Entering a customer's coupon in the POS interface is very similar to ***Entering a Discount***, as explained in the previous section. The main difference is that there is no need to enter a number before clicking the **Discount** button on the Keypad, because the coupon already has an assigned discount value.

When the **Select a Discount Type** window appears, click the **Store Coupon** button. The system displays the **Coupon Options** window:



Select the coupon to apply to the order from the drop-down list. The coupons are represented only by their name and date ranges; thus, it is important to name them so that they can be easily identified. Click the **OK** button. The system applies the coupon to the order provided that it is still valid.

Refer to ***Managing Coupons***, in Chapter 2, for more information about defining coupons.

Taking Payment for an Order

Once all of the items for the order have been entered and the quantities and prices have been adjusted as needed, payment can be accepted for the balance due on the order. The **BALANCE DUE** is a total of all of the line items, shipping, tax, and any additional charges minus any discounts that have been applied.

The only payment methods that can be accepted at the POS screen are those that have been pre-defined in The Stone Edge Order Manager. Refer to ***Payment Methods***, in Chapter 2, for more information.

Note: *The instructions below for taking a payment are the same for issuing a credit to a customer in the various payment methods that are mentioned.*

Taking a Cash Payment

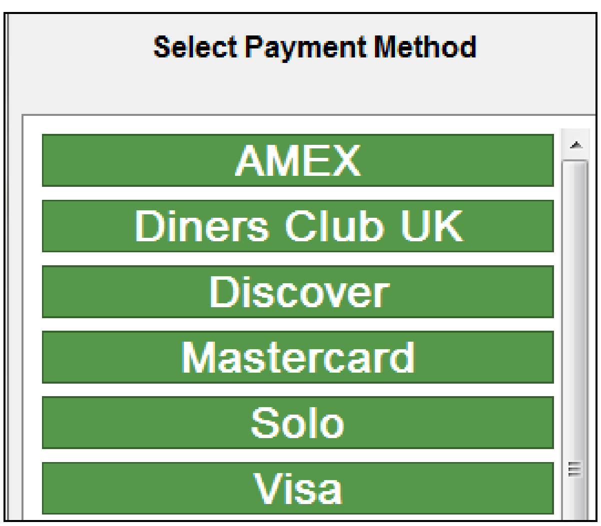
Complete the following steps to accept a cash payment for the current POS order:

1. Inform the customer of the **BALANCE DUE** displayed in the POS and Sale Information area of the POS interface.
    a. Use the **Keypad** or keyboard to enter the amount of cash that the customer gives you and then click the **Cash** button. See system parameter **POSAssumeDecimal**.
    b. If the customer provides the exact amount of cash that is due on the order, just click the **Cash** button and the program assumes the entire balance due is received.
2. The system opens the cash drawer and prints a receipt (if the POS system was configured to do so). The order is cleared from the screen.

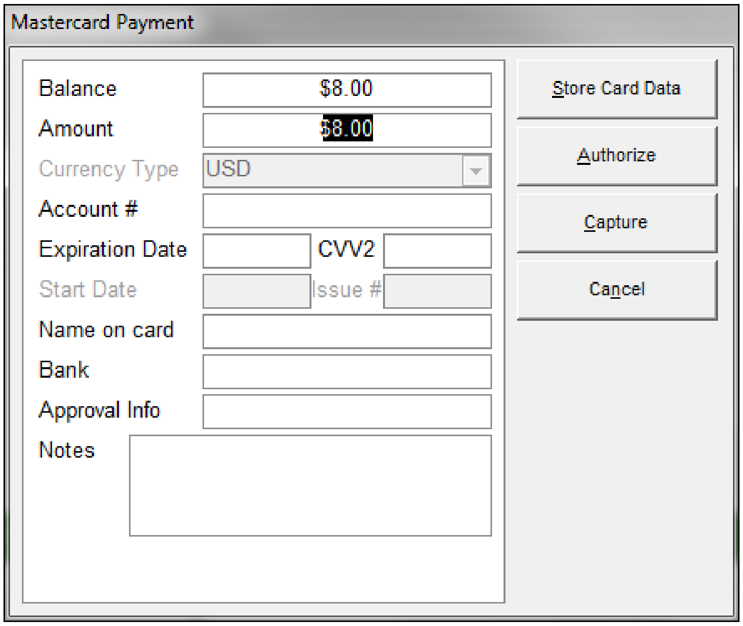
Taking a Credit Card Payment

From the **Keypad** tab, complete the following steps to accept a credit card payment for the current POS order:

1. Inform the customer of the **BALANCE DUE** that displayed in the POS and Sale Information area of the POS window.
2. If a credit card reader is configured on the current workstation, simply swipe the credit card through the reader and the appropriate **Payment** method window will open with the customer's information pre-filled. Skip to step 5. If a credit card reader is not available, click the **Credit** button.



3. Click on the type of credit card the customer is paying with. The system displays the **Process Payment** window for the selected credit card type:



4. Manually enter the appropriate information in the **Account#**, **Expiration Date**, **CVV2** and **Name on card** fields. It is also possible to edit the **Amount** if the customer does not want to pay the full amount with this payment method.
5. Click on the **Authorize** or **Capture** buttons to send the desired transaction type to the credit card processor. The credit card information is stored with the order. The **Authorize** button only authorizes the transaction for delayed capture while the **Capture** button performs an authorization and immediately charges the card. Refer to system parameters **RequireAuthForPOSOrders** and **RequireSaleForPOSOrders** to control the use of these buttons.
6. If you do not want to run an **Authorization** or a **Capture** immediately, but wants to record the customer's credit card information, click the **Store Card Data** button. An example of this usage is when a customer checks in at a hotel, runs a tab over the weekend and payment is not captured until checkout.
7. In order to process an approval manually (the bank has been contacted to get an approval code for a declined transaction), enter the **Approval Info**, and click the **Capture** button. A manually obtained approval code can only be used to capture funds; it will not work with an authorization. The Stone Edge Order Manager logs the transaction data, which is seen in the Payment section when an order is viewed.

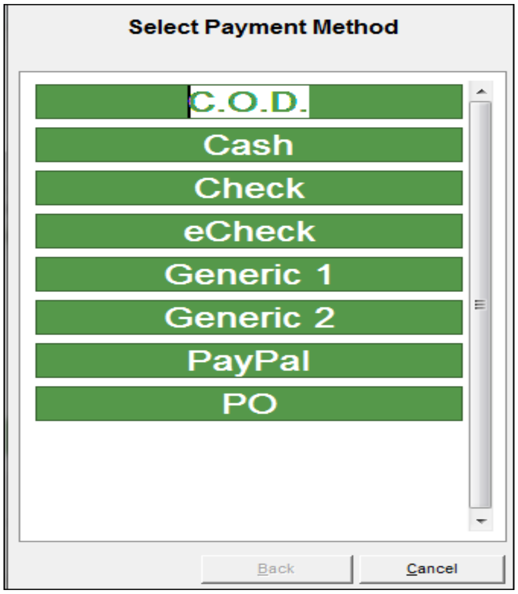
Note: *Since this type of transaction (forced capture) does not have a "TransactionID" from the credit card gateway, it is considered an "unqualified transaction" and WILL incur additional transaction processing fees from the merchant's gateway and their payment processor. Using this method is NOT recommended unless the merchant sells big ticket items and runs into this situation frequently.*

8. If the merchant does not have a POS credit card processor configured in The Stone Edge Order Manager, the **Log Payment** button appears on the Process Payment screen, allowing you to manually log payment information for the appropriate payment method. Manually enter the appropriate information in the **Account#**, **Expiration Date**, **CVV2,** and **Name on card** fields. **Notes** can be added as well and the **Amount** can be edited if the customer is only paying part of the balance with this credit card. Click the **Log Payment** button.

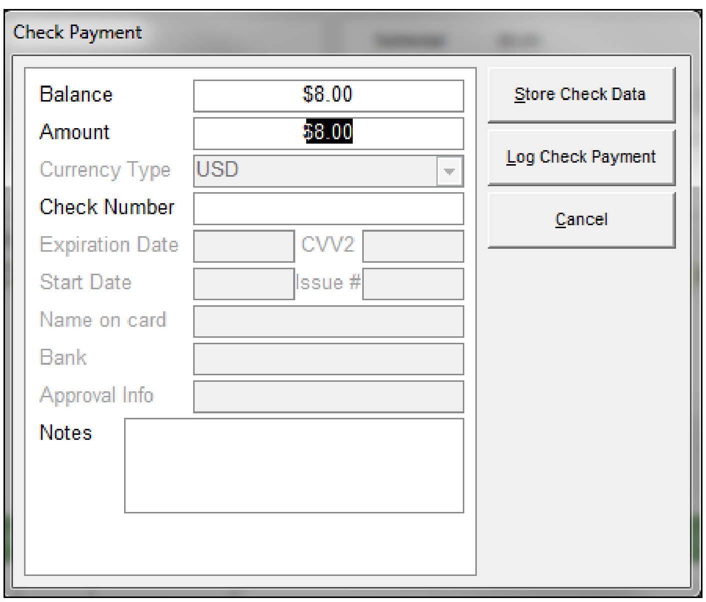
Taking a Check or Other Form of Payment

Complete the following steps to accept a payment by check or another pre-defined payment method for the current POS order:

1. Inform the customer of the **BALANCE DUE** displayed in the POS and Sale Information area of the POS window.
2. Click the **Other Pmts** button. The system displays the **Select Payment Method** window:



3. Click on the type of payment method the customer wants to use. The system displays the **Payment** window for the selected payment type:



4. It is possible to edit the **Amount** if the customer does not wish to pay the entire balance by this method.
5. Record any related comments for the merchant's use in the **Notes** field.
6. Enter the **Check Number** and click the **Log Check Payment** button.

The Stone Edge Order Manager logs the transaction data, which can be seen in the **Payment** section when viewing the order.

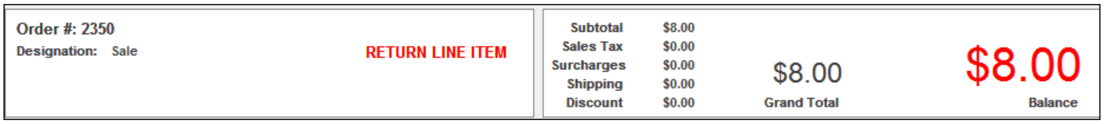
The **Store Check Data** button simply stores the payment information in the Order record for later use. No transaction is processed when the button is clicked. An example of when this button would be used is if the merchant provides a service (repair, etc.) and the full cost of the service may not be known in advance to allow for a pre-authorization. You can collect the payment information in advance and then retrieve it from the order and run the transaction when the customer returns.

Returning an Item

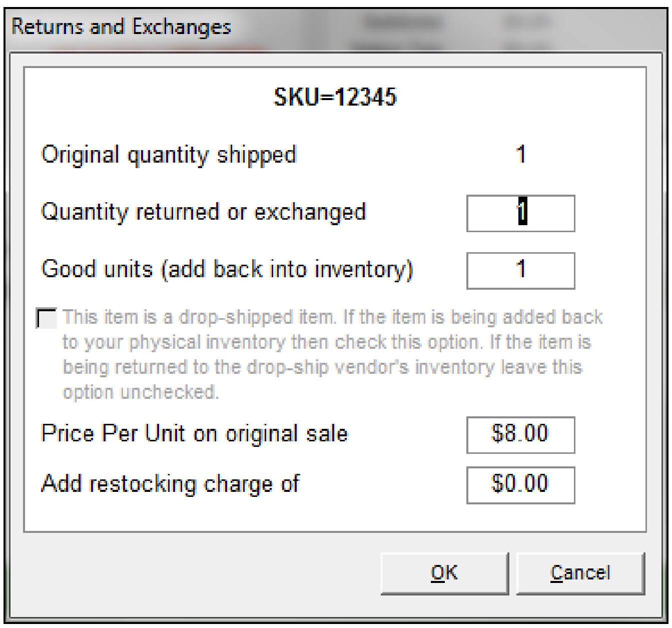
The POS interface makes it easy to process returns. Recall a past order and return the item against that order, or return it against a new order that can then have other items added to it. Refer to ***Recalling an Order***, later in this chapter, for more information on recalling existing orders to return items.

Complete the following steps to return an item without recalling the original order:

1. Click the **Return** button on the POS Keypad. The system displays **RETURN LINE ITEM** (in red) on the POS and Sale Information area to indicate that an item is about to be returned:



2. Enter the item: either scan the item's **Barcode**, enter the item **SKU** and press **Tab** or **Enter**, press an item Hot Key, or search the product database (F6) to locate and enter a product on the order. The system displays the **Returns & Exchanges** window:



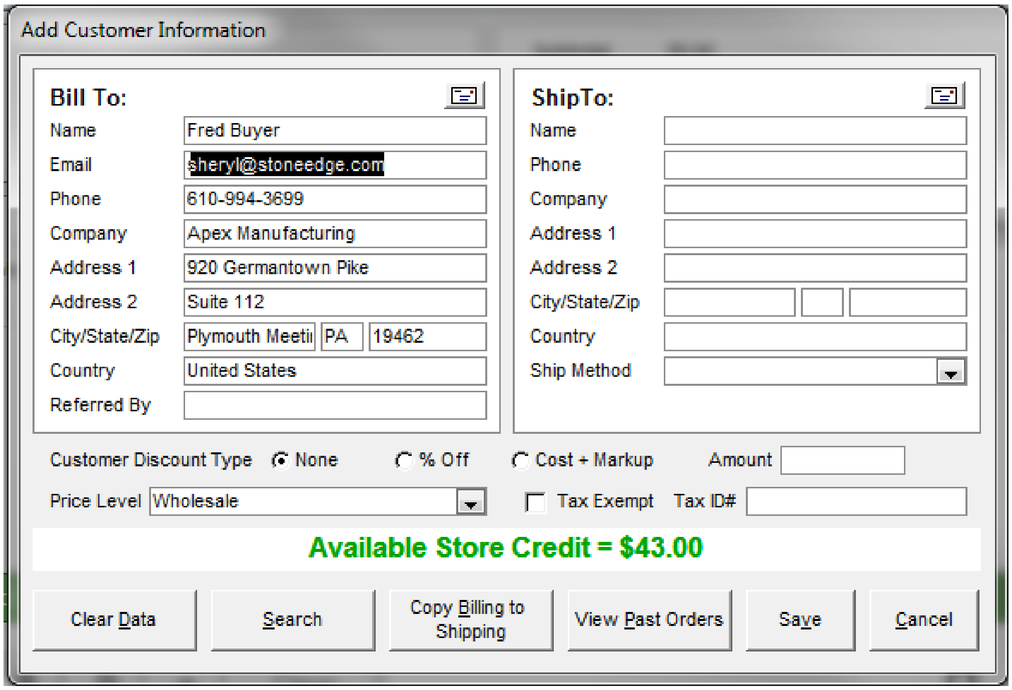
3. Enter the quantity of the item that is being returned and how many should be added back to inventory. Also, enter any restocking fee that the customer is charged.
4. Click the **OK** button. The system adds the line item with the entered quantity in the **Ret** column to indicate that the item was returned. Repeat steps 2 - 4 until all returned items have been added back into inventory.
5. If the customer is purchasing items at the time of the return, scan or add any new items to the order until it is complete.
6. If the **Balance Due** amount ends up being negative, the POS and Sale Information area indicates there is **Change Due** rather than a Balance Due. Either give the customer cash, issue a credit to their credit card account, or Store Credit can be issued. Refer to ***Store Credit***, below, for more information.

7. If the order reflects a **Balance Due, c**omplete the sale by processing the appropriate payment method, cash, check, credit card payment, Store Credit, etc.

Store Credit

Rather than giving cash back or refunding to a customer's credit card, many stores choose to issue **store credit** that can be redeemed for merchandise at another time. The Stone Edge Order Manager keeps track of any store credit that a customer may have accumulated, preventing lost or disputed credits.

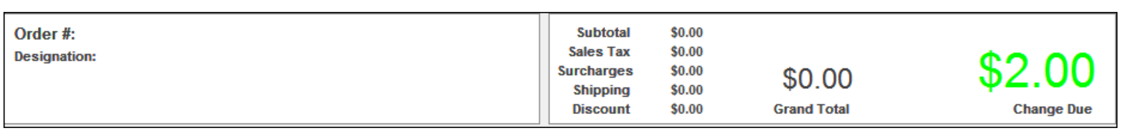
To lookup a customer's store credit amount, click the **Cust. Lookup** (F5) button. Type the customer's search criteria (i.e. name, address, etc.) and click **Search**. The amount of store credit, if any, is displayed in green text at the bottom of the screen:



<u>To issue or apply a store credit, the customer's information must be entered in the order!</u> Refer to ***Entering or Editing Customer Information***, earlier in this chapter for more information.

Issuing Store Credit

When an order has a negative balance due, for example when a customer has returned an item and does not wish to purchase anything else at that time, the POS and Sale Information area of the POS screen indicates **Change Due**.

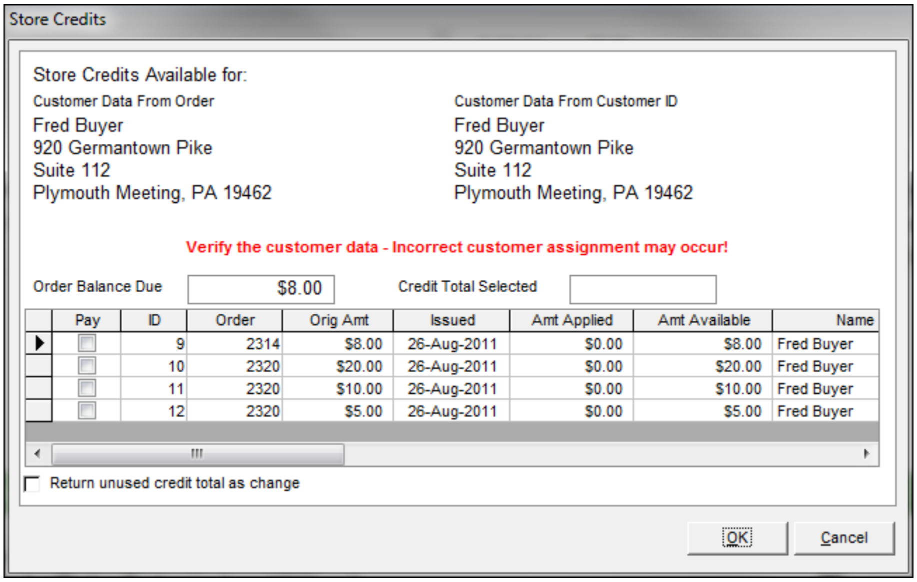


Complete the following steps to issue a store credit for the customer:

Note: *Customer data* ***must be entered*** *in the order to be able to issue store credit! Click the* ***Cust. Lookup (F5)*** *button to add customer information or use the* ***Search*** *button to find an existing customer record and associate it with the order. Click* ***Save*** *to apply this customer's data to the current order and then complete the following steps.*

1. When change is due on the order, click the **Store Credit** button. The system displays the

Customer Match confirmation dialog:



2. If the customer record matches the customer on the order, click the **OK** button to complete the sale. Clicking **Cancel** allows you to the opportunity to search the database (F5) for the correct customer record and associate it with the order so that the store credit can be issued to the customer. Once the customer information is assigned to the order and verified, the system creates the store credit for the customer and prints an invoice that reflects the amount of credit issued.

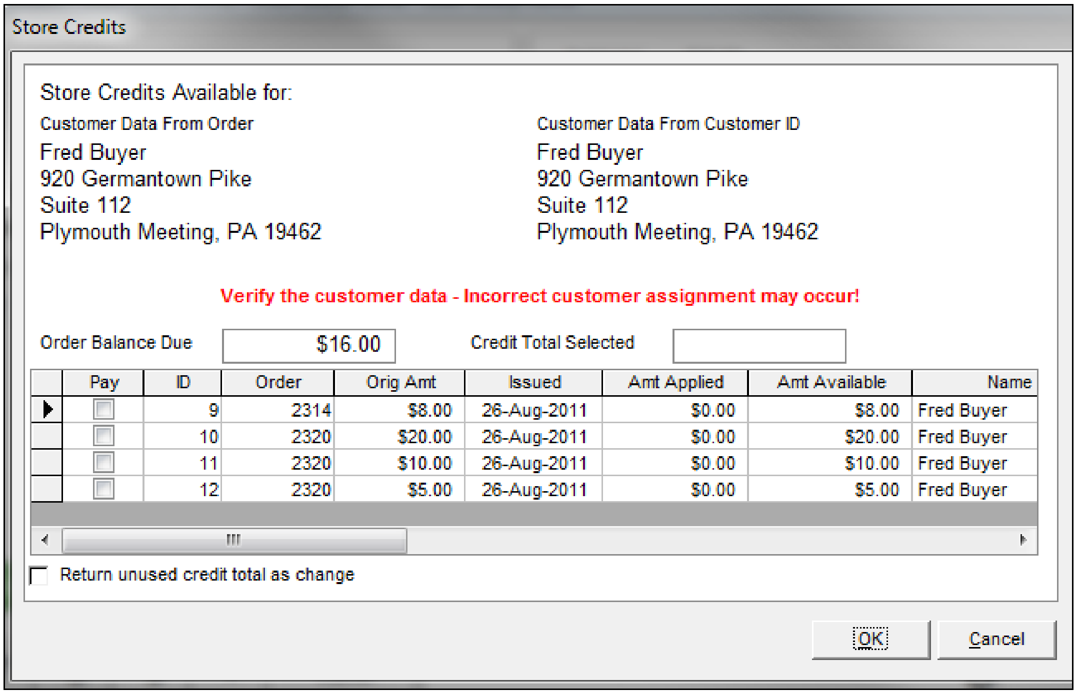
The store credit is then recorded in Stone Edge for a future purchase by that customer.

Applying Store Credit

If a customer has store credit, it can be used toward their next purchase. The Stone Edge Order Manager does not prompt you to use the store credit, so it is up to the customer to initiate the use of any existing store credit. To be able to issue store credit system parameter **POSAllowIssueStoreCredit** should be set to TRUE Also review the related parameters, **ManualOrdersShowStoreCredits**, **ShowStoreCreditBalanceOnPOSInvoice** and **StoreCreditsRemainingTemplate**.

Note: *Customer data must be entered into or associated with the order so that the store credit can be applied to the customer's record. To add existing customer data to an order with a balance due, click the* ***Cust. Lookup*** *button (F5). In the Edit or Add Customer Information box, type the customer's name and click* ***Search****. If the customer has store credit the amount is displayed at the bottom of the Customer Information box. See the figure in the beginning of this section. Click* ***Save*** *to associate this customer's data to the current order and then complete the following steps:*

1. With a balance due on the order, click the **Store Credit** button. The system displays **Store Credits**.



2. Verify that the customer information for the order is correct. If it is not correct, use the Customer Lookup (F5) button to add or locate an existing customer record.
3. Click the **Pay** check box for the store credit entry that is to be used. The **Credit Total Selected** field automatically populates with the **Amt Available** of the store credit that is selected.
4. To give cash back to the customer or credit their card for any remaining store credit amount, select the **Return unused credit total as change** check box. If that check box is not selected, any leftover store credit for the customer remains on file within The Stone Edge Order Manager.
5. Click the **OK** button.
6. The system completes the order. If the customer should be given change, **Change Due** is indicated. Then select the payment method (**Cash** or **Credit** buttons) to give change to the customer or issue a credit to their credit card, respectively. The credit card processor must be able to accept blind credits to credit the customer's card.

Putting an Order on Temporarily on Hold (F3)

If a POS order is started, and the clerk has to leave it temporarily for any reason, the order can be placed “on hold” by clicking the **Hold Order** (F3) hot key. The message “**ORDER(S) ON HOLD!**” is displayed in the POS and Sale Information area:

Note: *The* ***Hold Order*** *button is a preset Function Hot key on the POS interface. If you do not see this function key, the hot keys may have been changed from their default settings as described in this document. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see* ***Function Hot Keys,*** *earlier in this chapter.*

While one or more orders are on hold, new orders can be entered and processed. Later, the orders that were placed on “hold” can be recalled and completed. The order information for orders that were “held” in this fashion is stored in a temporary table, not in the main Orders table, and therefore, the order is not visible from Process Orders while it is in this “Hold” state.

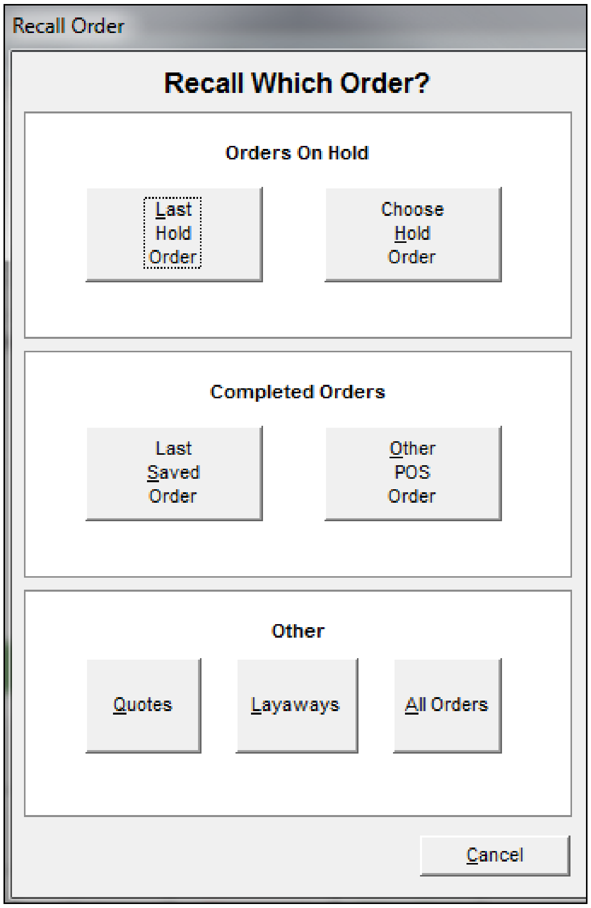
“On Hold” orders can only be recalled on the computer where they were entered, and must be recalled on the same day that they were entered. Orders left on hold at the end of the day are removed from the system the next time the POS screen is opened on that computer.

Recalling an Order

There are several ways to determine what type of orders will be recalled and there are several actions that can be performed against them, once they have been recalled to the Review Orders screen. An order can be recalled to return an item, reprint a receipt, print a gift receipt, place a reorder, fill back orders, activate a quote, process a layaway, or reload an order to the POS interface (only for orders not yet approved; see system parameters **ApprovePOSOrders** and **ApproveIncompletePOSOrders**).

Complete the following steps to recall an order:

1. Click the **Recall Order** (F4) hot key. The system prompts you for the type of order to be recalled:

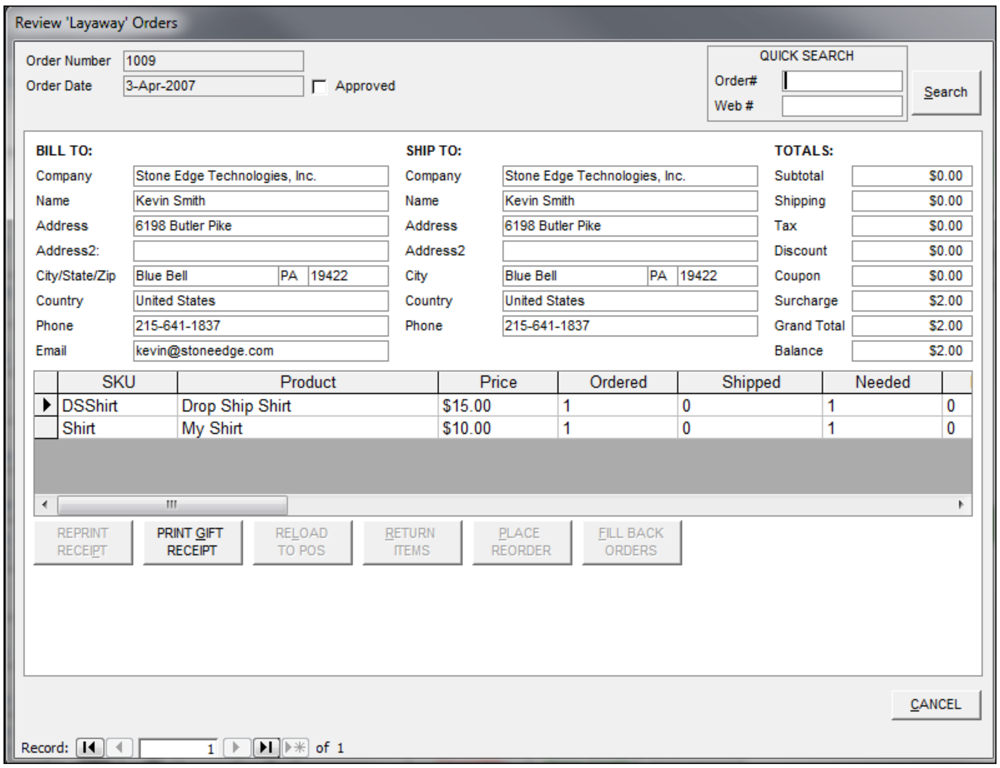


Note: *The* ***Recall Order*** *button is a preset Function Hot key on the POS interface. If you do not see this function key, the hot keys may have been altered from their default settings as described in this manual. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see* ***Function Hot Keys,*** *earlier in this chapter.*

2. Select the type of order to be recalled by clicking the appropriate button. The choices are:

   - **Orders On Hold** (orders placed on hold at the POS screen) – These orders can be recalled so they can be completed and charged. Either select the **Last Hold Order**, or browse the on hold orders to select one to recall.
   - **Completed Orders** (for POS, Manual Entry, or Imported orders) – Past orders can be recalled for returns, reorders, reprints, or for reference only. Either select the **Last Saved Order**, or browse all completed orders to select the one you want.
   - **Other** – Orders designated as Quotes or Layaways can be recalled to be paid and/or processed. Browse through **Quotes**, **Layaways**, or **All Orders**.

3. If **Last Hold Order** or **Last Saved Order** was chosen, the system displays only that order. Otherwise, the system displays the **Review * Orders** window, where the clerk can search for and select the order to recall. In this example, **Layaways** was selected:



4. Enter an **Order #** or a **Web Order #** in the **Quick Search** field in the top right corner of the screen to find a specific order, or use the Access navigation arrows at the bottom of this window to scroll through the orders, or click the **Search** button to search the orders by criteria other than the order number.

5. When the order to be recalled is located, select the action to be performed by clicking the appropriate button at the bottom of the window. Depending on the current state of the order, the possible actions are:

   Reprint Receipt – The system prints the original POS Invoice to the selected POS printer.

   Print Gift Receipt – The system prints the POS Gift Invoice to the selected POS printer.

   Reload to POS – The order is sent to the POS interface for review or completion. *This option is not available for orders that are already approved*. See system parameters, **ApprovePOSOrders** and **ApproveIncompletePOSOrders**.

   Return Items – The system displays the **Return Items** window. Refer to *Returning an Item*, earlier in this chapter, for more information.

Place Reorder – The system displays the **Reorder Items** window. Select the items to reorder and click **OK** to create a new order. Refer to *Placing a Reorder,* found later in this chapter for more information.

Fill Back Orders – The system displays the **Fill Back Orders** window. Refer to *Processing Back Orders*, in Chapter 7, for more information.

Deleting Line Items from a Recalled Order

If an order has not been approved yet, the order can be recalled, reloaded to the POS interface, and line items can be deleted – effectively refunding an order. Complete the following steps to delete line items from a recalled order:

1. Click the **Recall Order** hot key and choose **Last Saved Order** or **Other POS Order** and select the order to be reloaded from the **Review Last 'POS' Order** or **Review 'POS' Orders** screen.

***Note:** The **Reload to POS** button is only valid for orders which have not been approved. See system parameters **ApproveIncompletePOSOrders** and **ApprovePOSOrders** to determine if all POS orders are automatically approved.*

2. Click the **Reload to POS** button to re-open the order in the POS interface.
3. For each product to be deleted, click anywhere in the line item and click the **Delete Item** button. A message box asks for confirmation before deleting the item. Click **Yes** to delete the item.
4. The POS and Sales Information section displays the **Change Due** the customer. Be aware that if system parameter **POSIssueCreditAsStoreCredit** is set to TRUE, then any refund must be given as store credit.
5. Choose the refund method:
   a. For a cash refund, click **Cash**. Click **OK**.
   b. For a credit card refund, click the **Credit** button. Select the credit card type and enter the account information on the Process Payment screen. Click the **Capture** button to refund the amount displayed to the customer's credit card account.
   c. Click the **Store Credit** button to issue a store credit. To be able to issue store credit, the customer's information must be entered in the order, if it is not already there. The Process Orders screen shows the Cash or Credit returned for this order number.

Reprinting a Receipt

The Stone Edge Order Manager offers several methods to do this:

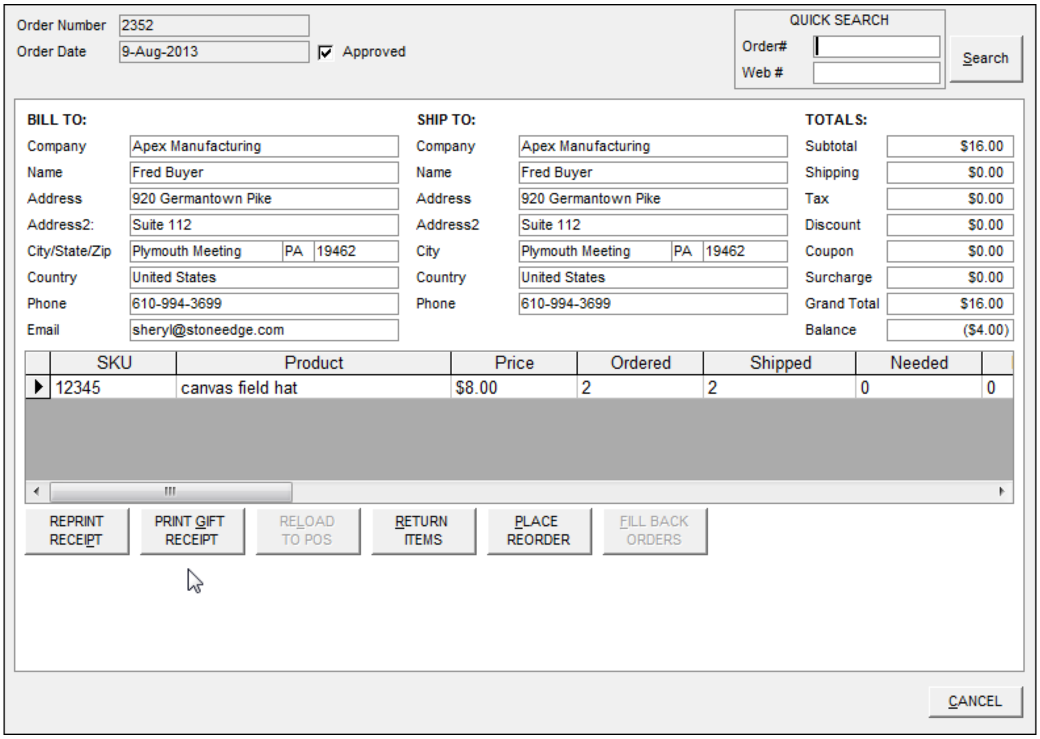
1. Click the **Reprint Receipt** (F11) hot key to reprint the receipt for the *last completed POS order.* Using the **Reprint Receipt** (F11) hot key while a POS order is being created prints a receipt with incomplete information.
2. Search for other existing orders by pressing the Recall Order (F4) hot key and navigating to the appropriate order from the Review * Orders screen and clicking the **Reprint Receipt** button (F11) hot key. (The default hot keys settings may have been altered by the user). Refer to ***Recalling an Order***, earlier in this section, for information on recalling a past order.

Printing a Gift Receipt

If the customer requests a gift receipt, it is possible to do so after the order has been completed. Click the **Gift Receipt** hotkey.

***Note:** The **Gift Receipt** button is a preset Function Hot key on the POS interface. If you do not see this function key, the hot keys may have been altered from their default settings as described in this document. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see **Function Hot Keys,** earlier in this chapter.*

The system displays the **Review All Orders** window with the last completed order displayed by default:



Click the **Print Gift Receipt** button to print a gift receipt for the last completed order. To print a gift receipt for a different order, browse the records in the **Review All Orders** window or perform a **Quick Search** by order number. The order can also be located by clicking the **Search** button and entering criteria other than the order number.

Placing a Reorder

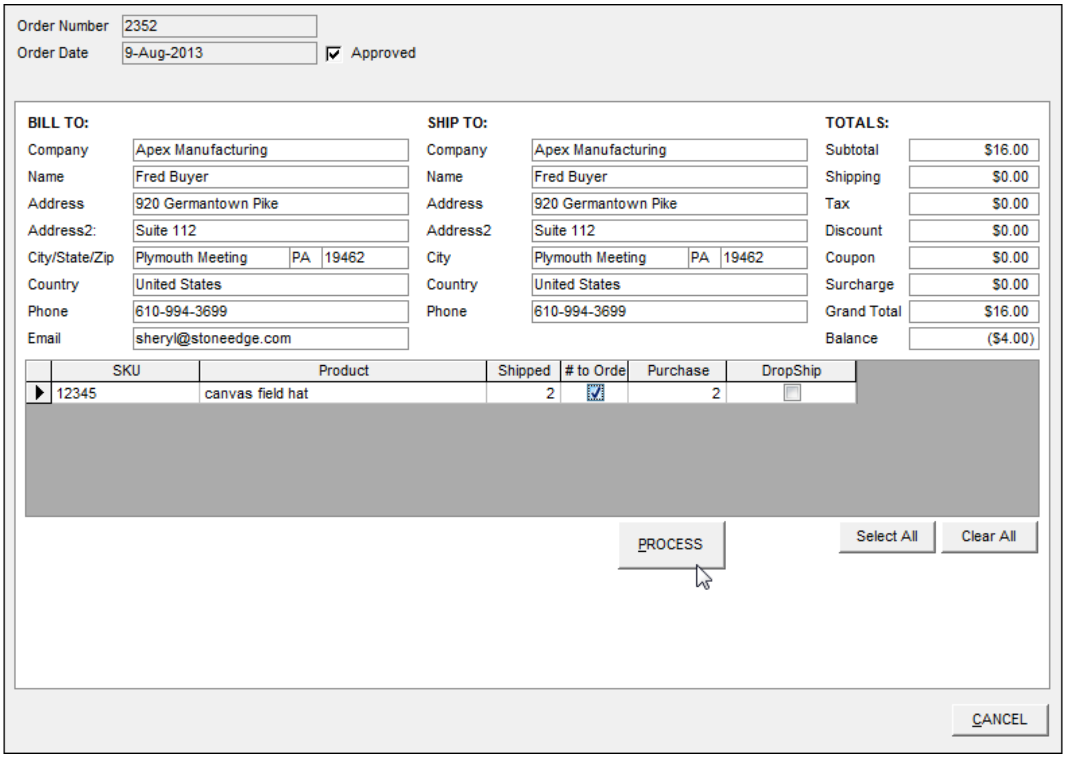
If the customer wants to order some or all of the same items that were purchased on a previous order, locate the order via the **Recall Order** (F4) hot key and choose the appropriate order type button (**Last Saved Order**, **Other POS Order** or **All Orders**). Click the **PLACE REORDER** button on the Review * Orders screen, where * = POS or All. In the example below, the **All Orders** button was selected.

***Note:** The **Recall Order** button is a preset Function Hot key on the POS interface. If you do not see this function key, the hot keys may have been altered from their default settings as described in this document. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see **Function Hot Keys,** earlier in this chapter.*

The system displays the **Review All Orders** window with the oldest completed order displayed by default:

1. Navigate to the appropriate order by scrolling through the orders records or perform a **Quick Search** by order number. The order can also be located by clicking the **Search** button and entering criteria other than the order number.

2. Click the **Place Reorder** button and the Reorder Items screen will appear:



3. Check the box in the **# to Order** field for any items that should be reordered. Also indicate the quantity in the **Purchase** column and check the **Drop Ship** box if the item is to be drop shipped.

4. Clicking the **Select All** or **Clear All** buttons will either check or uncheck the **# to Order** check boxes for all line items included in the original order.

5. When finished making any changes, click the **Process** button to create the new order and return to the POS screen to finish processing the order.

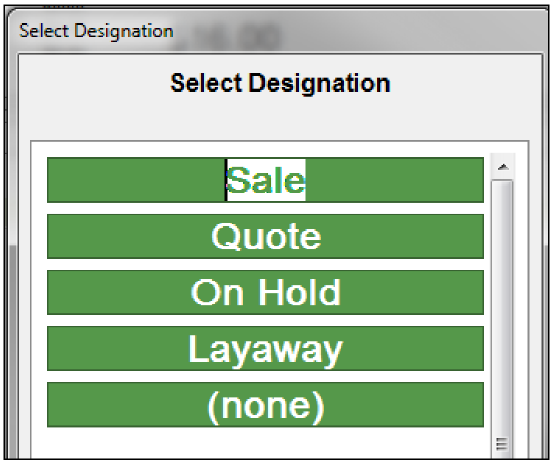
Creating a Special Order

The **Special Order** hot key puts the current order on hold or allows it to be changed to a quote or a layaway order.

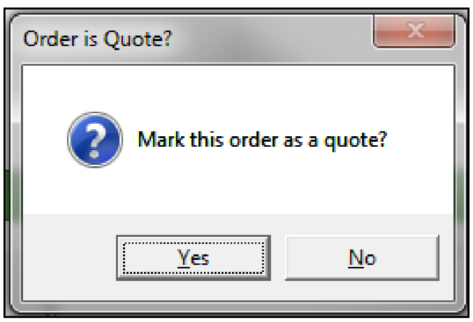
Note: *The **Special Order** button is a preset Function Hot key on the POS interface. If you do not see this function key, the hot keys may have been altered from their default settings as described in this manual. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see **Function Hot Keys,** earlier in this chapter.*

Complete the following steps to change the designation of an order:

1. Recall the order if necessary, or click the **Special Order** hot key. The system displays the following window:



2. Select **Sale**, **Quote**, **On Hold**, or **Layaway** to change the designation of the current order. The system displays a confirmation dialog:



3. Click the **Yes** button to change the order type.

If a quote is created, it can be recalled at a later date and changed to an order. Quotes can be recalled at the POS screen or at the Manual Orders screen.

Designating an order as being “On Hold” from this screen adds the message “Order Number on hold for POS sale” to the **Reasons for Review** field of the order, which is visible at the Process Orders screen. Also, the Order State field is set to “On Hold” as seen at the Process Orders screen. See the image below. This is different than placing an order temporarily on hold via the F3 hot key.

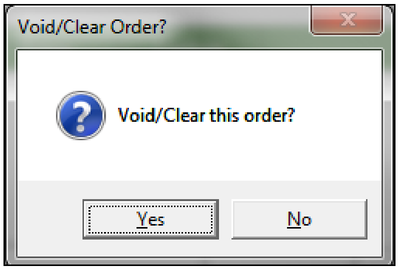
Voiding an Order

While an order is in process – BEFORE hitting any payment function buttons or saving the order -- the current order can be voided. Once payment is entered or the order is saved, it is logged in the system and CANNOT be voided.

***Note**: If the order has already been saved or a payment function button has been chosen and you want to "zero out" an order, see **Deleting Line Items from a Recalled Order**, earlier in this chapter if the order hasn't yet been approved. If the order has been approved, see **Returning an Item**, earlier in this chapter for more information.)*

While an order is in process, complete the following steps to void an order from the POS interface:

1. Click the **Void Order** hot key to void the current order. The system displays the following dialog box:



***Note:** The **Void Order** button is a preset Function Hot key on the POS interface. If this function key is not visible, the hot keys may have been altered from their default settings. Try pressing Shift, Ctrl, or Alt on your keyboard to display a different set of function keys. For more information, see **Function Hot Keys,** earlier in this chapter.*

2. Click the **Yes** button to void or clear the current order.
   a. When a new order is voided, the order disappears from the screen and the order information is handled according to the setting of system parameter **KeepVoidedPOSOrderNumbers**, and the order cannot be recalled.

   ***Note:** If the **Keep Voided POS Order Numbers** option is checked (this is the system default) on the Miscellaneous Tab of the POS Setup screen, the order number will remain in the Orders table but will not be visible from the Process Orders screen. To completely delete voided orders from the Stone Edge Order Manager database, uncheck the **Keep Voided POS Order Numbers** option. In this case, the voided order number will be re-used for the next order if the voided order was the last order in the system.*

   b. If a recalled order is viewed, any changes made to the order are lost and the order is removed from the screen, however, it still exists in the system in its original state. It can be recalled again.

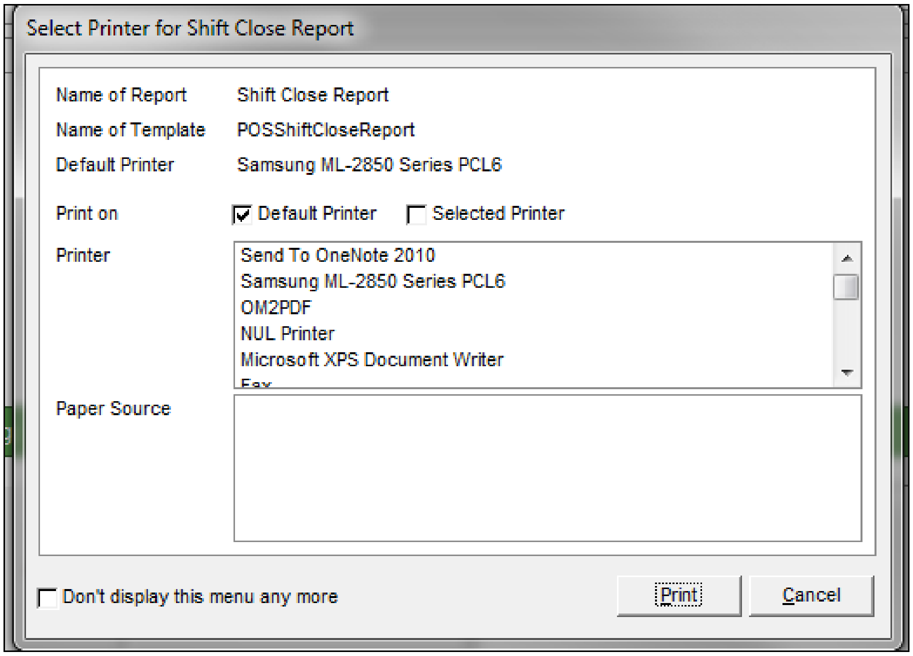
Ending a Shift

At the end of each user's shift (or whenever an audit of the workstation's transactions is performed), the shift must be "closed" in The Stone Edge Order Manager. Use the ZOut() function to close a shift.

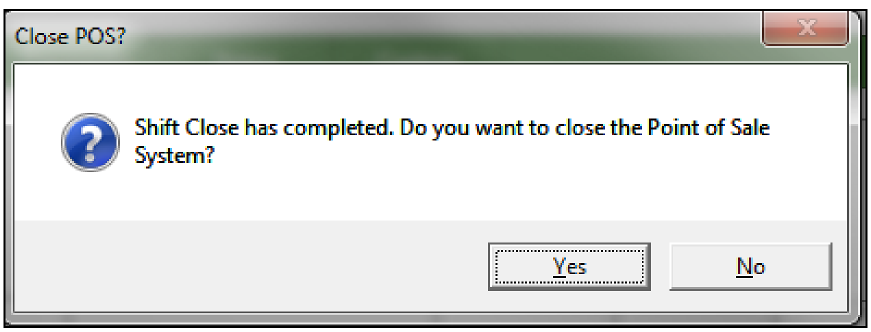
The **Close Shift** [ZOut()] function is assigned to the SHIFT+F1 key combination by default. See ***Assigning Hot Keys for the POS Interface***, earlier in this chapter, for more information about adding or changing hot keys.

Press the **Shift** key to see the set of POS function keys that are available by default:

1. Click the button on the POS screen or enter the key combination (Shift+F1) and the program I opens the Select a Printer form, providing that system parameter **UsePrinterMenu** is set to TRUE. Otherwise the Shift Close Report is sent to the workstation's default printer:

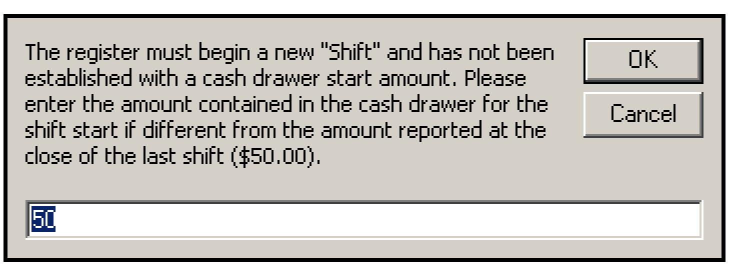


2. After the report is printed, the program prompts you:



   a. If **Yes** is selected the program closes the POS form or the entire program, if the workstation is only permitted to open the POS system of The Stone Edge Order Manager. Refer to Computer Startup Screens in the List Maintenance function of the program (**Main Menu > Settings > Data Functions > List Maintenance**). See the Knowledge Base article, *Defining Task Specific Workstations*, for instructions. The next time the program is opened, you are prompted to start a new shift, as shown in the **No** response below.

   b. If **No** is selected, you are prompted to establish a new shift and verify the starting amount of cash in the drawer before the POS interface is re-opened:



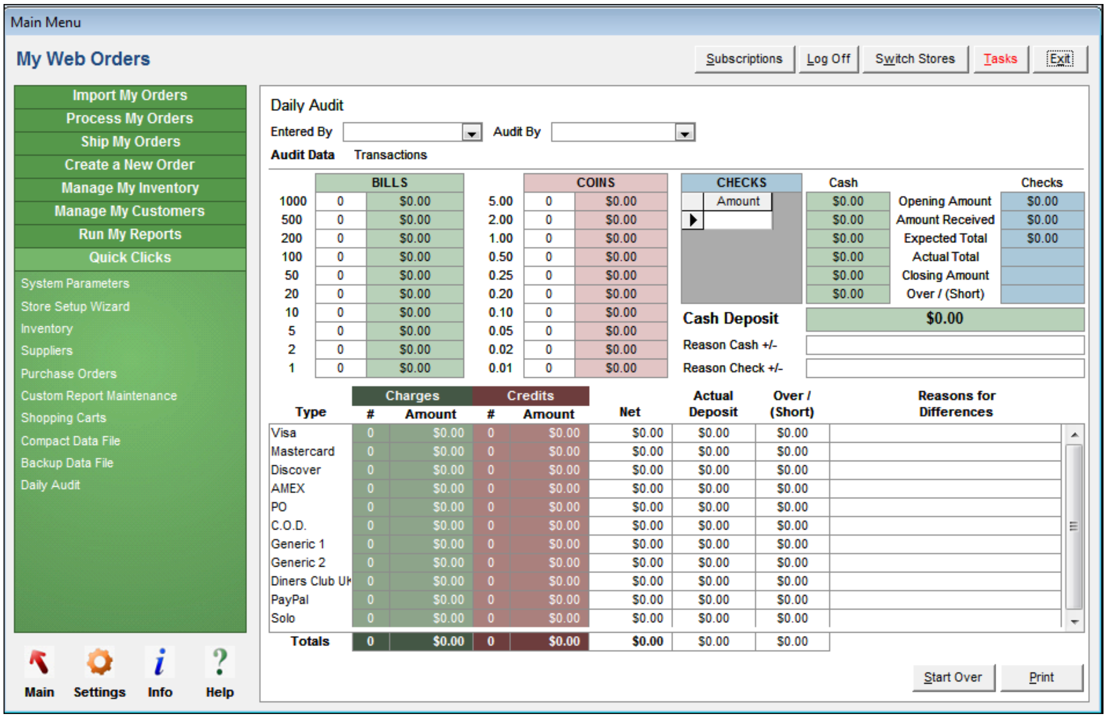
3. Complete the daily audit of the cashier's drawer.

Auditing Shifts

The **Daily Audit** window is used to reconcile the funds in the cash register(s) at the end of each day. The **Daily Audit** can be configured to include all orders (Web, Manual and POS), or just POS orders. There are initially two tabs on the **Daily Audit** window: **Audit Data** and **Transactions** that are described later in this section.

To conduct a Daily Audit, select **Daily Audit** in the Quick Clicks on the Main Menu, or, navigate to **Main Menu > Settings > Order Functions > Daily Audit**.

The system displays the **Daily Audit** window:



Configuring the Daily Audit

Before using the Daily Audit function, configure the system parameters to control how the audit function compiles and produces information.

Click the **System Parameter** button on the **Quick Clicks** menu, or go to **Main Menu > Settings > System Functions > Set System Parameters.**

Enter "**audit**" in the Search For: box at the top of the screen to see all of the audit-related system parameters that are in different parameter groups. See the Knowledge Base article, ***Daily Audit**,* for more details. Refer to ***Setting System Parameters***, in Chapter 2.

Audit Data Tab

Before performing an audit for a POS workstation, the “shift” must be “closed” on that workstation. Refer to **Ending a Shift**, earlier in the chapter, for more information.

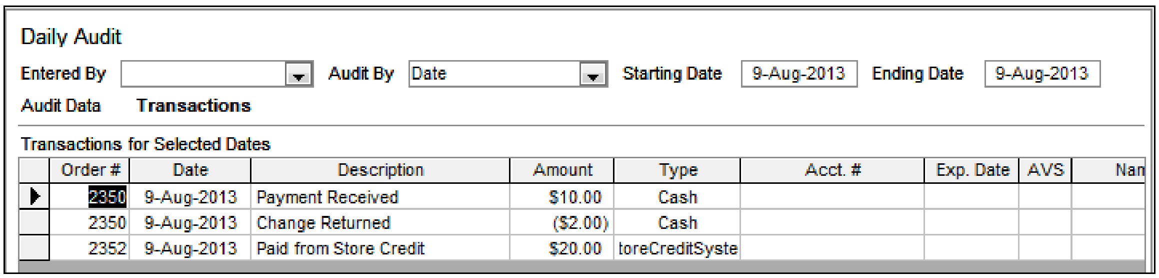
The **Audit Data** tab is used to enter any currency and/or checks received during a given shift. You can choose to **Audit By** any of the following options: **Date** (all registers and shifts for a day), **Register** (all shifts at a single workstation for a day), or **Shift** (select any closed shift to audit).

To enter bill and coin information, type in the number count (not the dollar value) of each denomination. For checks, enter the dollar amount of each check. There should be a standard starting amount for each cash drawer, and that amount should be entered in the **DrawerStartAmount** system parameter.

As information is entered, the **Daily Audit** window calculates and displays the totals for the selected date range. If a mistake is made, it is possible to start over at any point by clicking the **Start Over** button. That button clears the screen of manually-entered data. When data entry is complete, and the results of the count are satisfactory, click the **Print** button to post the data to the Stone Edge Order Manager database and print a hard copy of the audit.

Transactions Tab

The **Transactions** tab of the Daily Audit window lists the details of each payment transaction entered and/or received for the selected workstation and day. Credit card transactions are summarized on the **Audit Data** tab and cannot be modified. Use the **Transactions** tab to help find any mistakes or problems with your daily audit.



7 Managing Orders

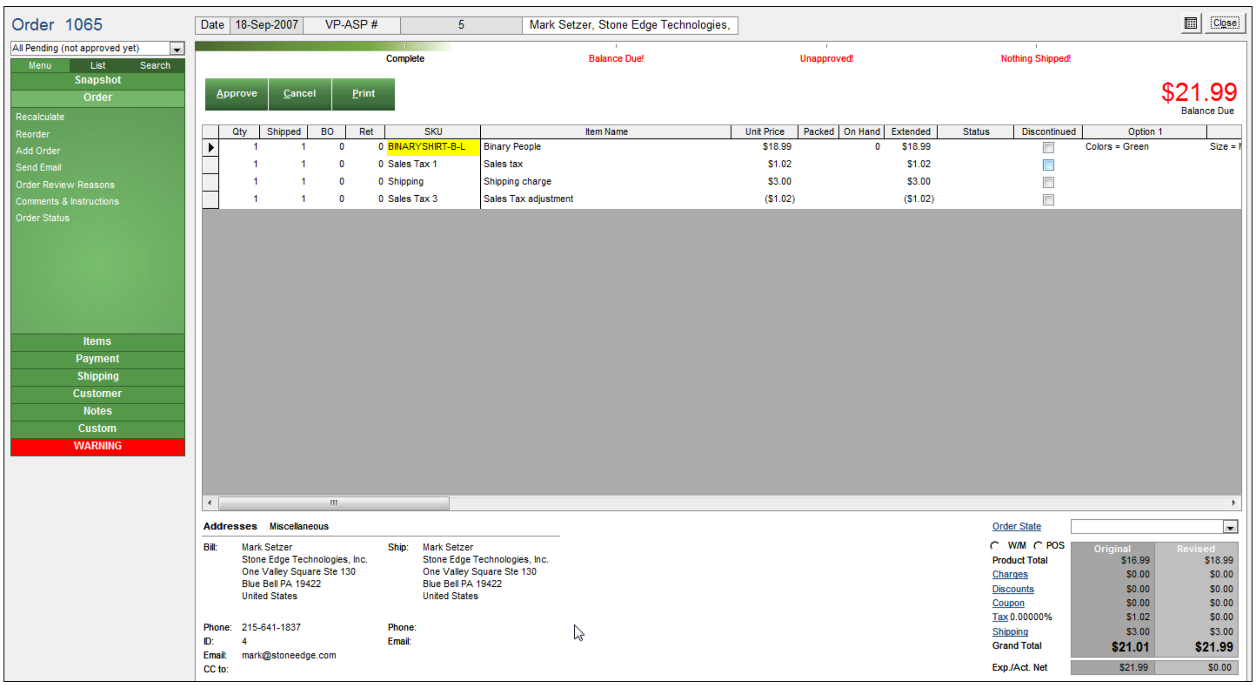
The Stone Edge Order Manager has a wide variety of tools for dealing with your orders. Many of those tools are explained in this chapter, including:

Filtering and Searching for Orders

The Stone Edge Order Manager has two screens where most of the work of processing orders is performed. At the **Process Orders** screen, it is possible to select a group of orders and then process them individually. At the **Multi Order Processor**, a group of orders are selected and then they are processed in a batch. Either screen <u>can</u> be used with any type of order, e.g. **Web, Manual** and **POS** orders; however, the Multi-Order processor is <u>not normally used</u> with POS orders.

Complete the following steps to view one or more orders:

1. Go to **Main Menu > Process My Orders > View and Process My Orders**. The system displays the **Process Orders** window:



The Quick Filter applied to the Process Orders window when it is initially opened is controlled by the system parameter **DefaultOrderView** . The default value is All Pending (not approved yet).

2. Select which orders to view using one of the following methods:

   a. Use the **Quick Filter** drop-down to select the type of orders to be viewed. Click **Search** to locate orders by order number, date or customer information. Click **Begin Search** or select **Advanced Search** to use other fields as search criteria. The system displays the **Search for Orders** window

   b. Use one of the following shortcuts:

      i. Press **Control**+**Shift**+**O** (that's the letter "O", not a zero) to search for a specific The Stone Edge Order Manager order number.

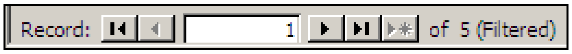
      ii. Press **Control**+**Shift**+**W** to search by the Web order number (the order number assigned by the shopping cart).

      iii. Press **Control**+**Shift**+**L** or **Control+Shift+N** to search by Last Name.

      iv. Press **Control**+**Shift**+**C** to search by Company Name.

   Searches by Last Name and Company Name are "wild card" searches – the program searches for cases where the name begins with the characters that are entered.

3. The number of order records that match the filter criteria appears in the bottom left-hand corner of the **Process Orders** screen. Browse through those records using the left and right arrows.



Order Functions

There are a number of functions available at the **Process Orders** screen, including:

Recalculating Order Totals

Reordering and Reshipping

Adding Orders from the Process Orders Window

Printing Orders

Approving Orders

Canceling or Deleting an Order

Searching for Orders

Processing Back Orders

Showing/Hiding Kit Parts

Sending Email to Customers

Viewing Purchase Orders for Items that are On Order

Adjusting the Quantity on Hand while Viewing an Order

Setting the Order State

Recalculating Order Totals

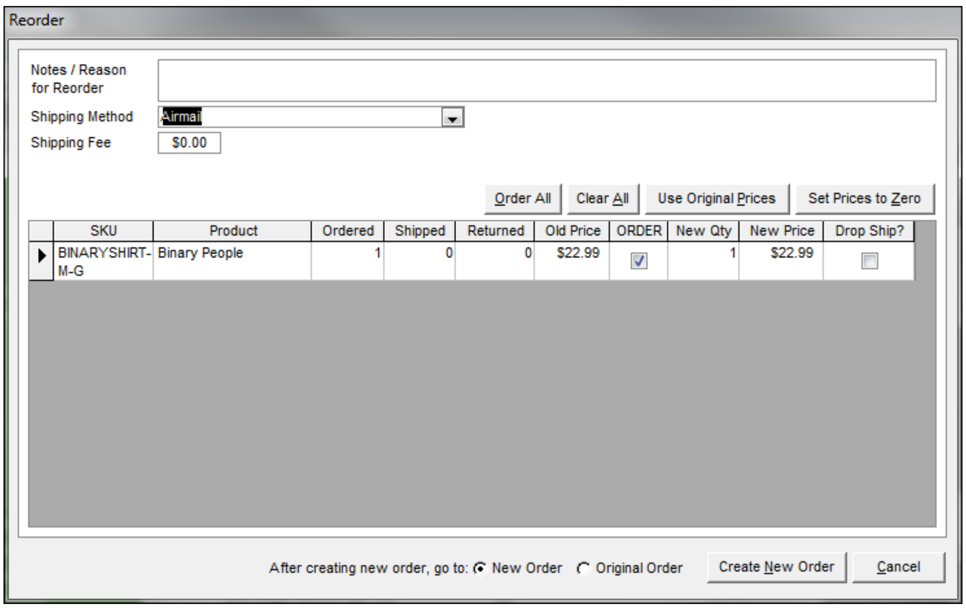
While The Stone Edge Order Manager normally keeps all costs, totals, and shipping charges calculated and up to date, there are circumstances under which the order total may not be correct. The **Recalc** button on the **Process Orders** screen allows you to recalculate the order totals at any time.

Reordering and Reshipping

The **Reorder** feature of the **Process Orders** window allows you to quickly reorder or reship items by creating a new order from an existing order. Common uses for this feature are if an item was lost in shipment or if a customer just wants to place an order similar to one placed previously.

Complete the following steps to reorder or reship items from a past order:

1. Go to **Main Menu > Process My Orders > View & Process My Orders**:
2. Locate the appropriate order by using **Search** button on the **Process Orders** accordion.
3. Click the **Reorder** link on the accordion. The system displays the **Reorder** window:



4. Select a **Shipping Method** from the drop-down list and enter any **Shipping Fee** for the new order. The shipping fee may be waived if the item was lost through no fault of the customer.
5. The program preselects all items and quantities on the original order. You can deselect individual line items by clearing the **Order** check box or you can change the number of units by editing the value in the **New Qty** column. Use the **Order All** and **Clear All** buttons to quickly select or clear the check boxes for all line items.
6. You can also change the **New Price** for each line item, or use the **Use Original Prices** or **Set Prices to Zero** buttons to change prices for all line items.
7. Select whether to return to the **Original Order** or view the **New Order** upon saving by clicking the appropriate radio button.
8. Click the **Create New Order** button.

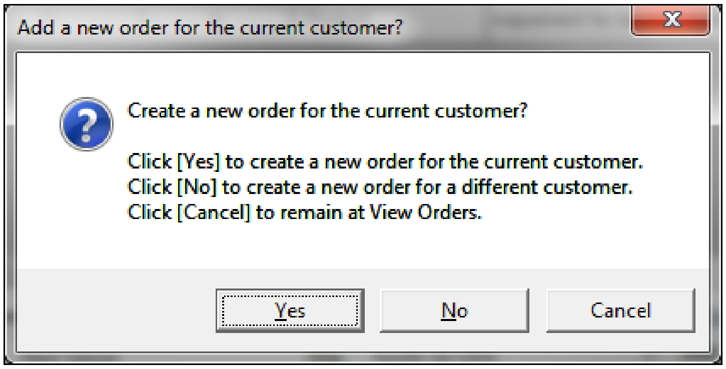
The system creates a new order for the customer with the line items and quantities entered on the **Reorder** window.

Adding Orders from the Process Orders Window

The **Add Orders** button on the **Process Orders** screen opens the Manual Orders window, with an option to pre-select the customer from the current order and fill in their information automatically.

Complete the following steps to add a new order for the current customer:

1. Go to **Main Menu > Process My Orders > View & Process My Orders**:
2. Locate the appropriate order by using **Search** button on the **Process Orders** accordion.
3. Click the **Add Order** link on the accordion. The system displays a confirmation message:



   a. Click **Yes** to create a new order for the customer whose order is currently being viewed.

   b. Click **No** to create a new "blank" order.

The system displays the **Manual Orders** window. Refer to ***Entering Orders Manually***, in this chapter, for more information.

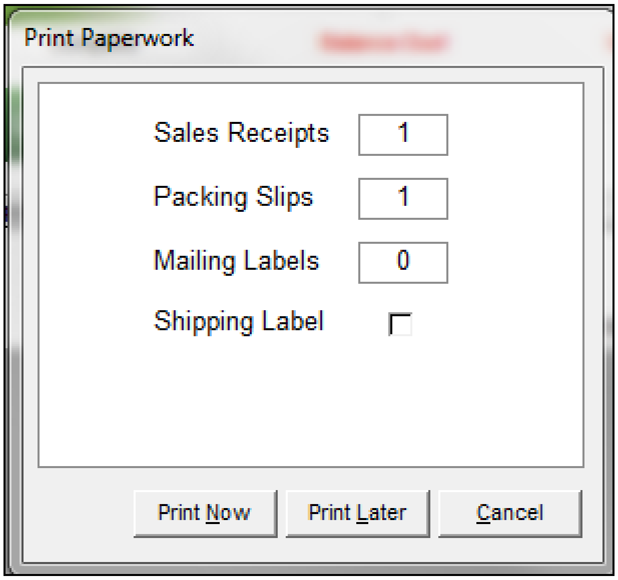
Printing Orders

The **Print** feature permits sales receipts (also known as invoices), packing slips, mailing labels and/or shipping labels to be printed for the selected order. The paperwork can be printed right away, or added to the **Batch Queue** for printing at a later time.

Complete the following steps to print paperwork for an order from the **Process Orders** window:

1. Go to **Main Menu > Process My Orders > View & Process My Orders**:
2. Locate the appropriate order by using **Search** button on the **Process Orders** accordion.

3. Select the **Order** or **Items** tab, and click the **Print** button.



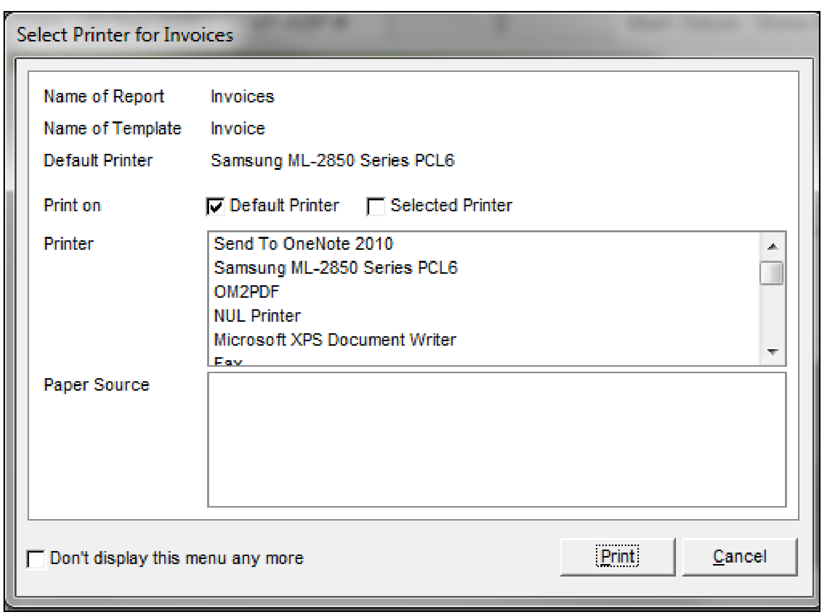
> ***Note:*** *A message box requesting permission to print the paperwork is displayed if the order has not yet been approved or is not paid in full.*

4. Enter the number of **Sales Receipts**, **Packing Slips**, and **Mailing Labels** to be printed. If parameter **PrintShippingLabels** is TRUE and the order has a shipping method that uses one of our integrated shipping systems, you can also choose to print a shipping label.

> ***Note:*** *A* ***Mailing Label*** *typically just has From: and To: addresses. A* ***Shipping Label*** *is usually formatted for a carrier (UPS, FedEx, USPS, etc.), contains postage, and may including their tracking number, barcodes, etc. The latter requires the configuration of integrated shipping vendor software.*

5. Click **Print Now** or **Print Later**. If **Print Later** is selected, the paperwork is added to the batch print queue, which is accessible from **Main Menu > Run My Reports >View My Batch Report List**.

6. If the system parameter **UsePrinterMenu** is set to **True**, the **Select a Printer** window appears:



7. Choose either the **Default Printer** or **Selected Printer** check box.
8. If necessary, **Select a Printer** and **Select a Paper Source** from the appropriate lists.
9. Optional: Clicking the **Don't display this menu any more** check box at the bottom of the window results in system parameter **UsePrinterMenu** being set to FALSE, and this dialog box no longer appears at *any* workstation in the networked Stone Edge Order Manager configuration, as this is a global system parameter. All reports generated by The Stone Edge Order Manager are sent to the default Windows printer.
10. Click **Print**.

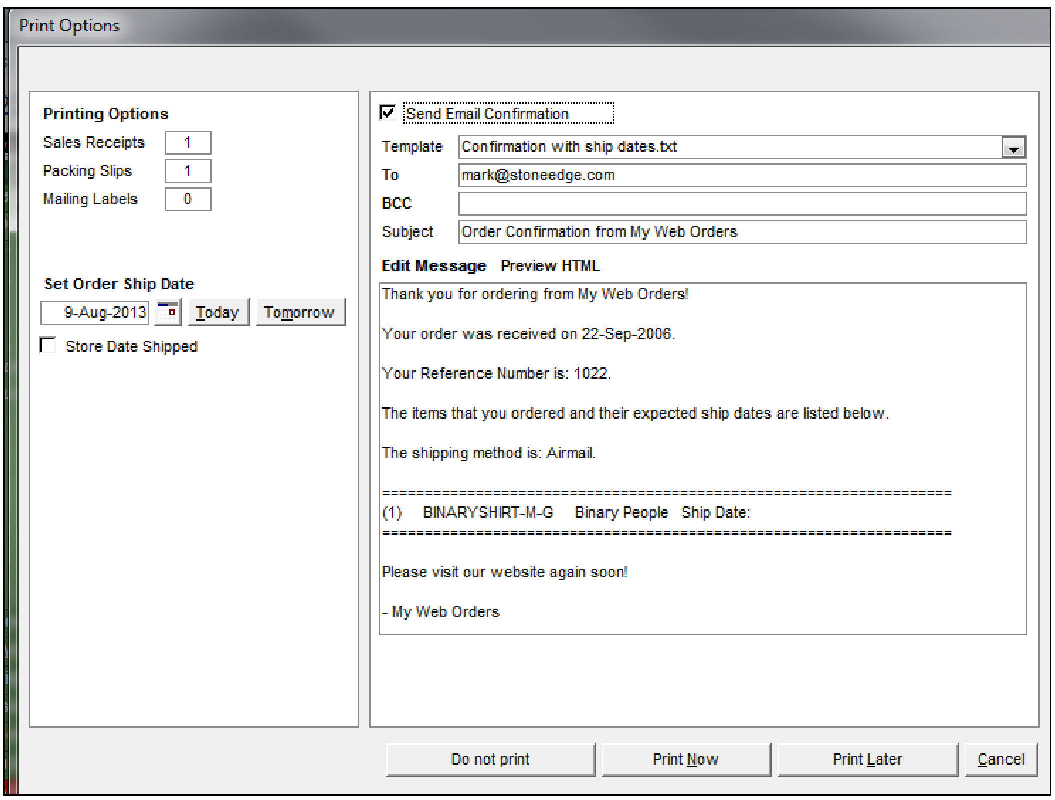
The system prints the paperwork at the selected printer.

Approving Orders

Use the **Approve** button on the **Orders** screen to "approve" an order. There is some flexibility when that should be done, but generally orders should be approved when they are complete, paid for, and ready to ship. The Stone Edge Order Manager can be configured to approve orders that meet certain requirements as they are imported from a shopping cart (i.e., payment has been approved and there are no backorders), or the program can require all orders to be approved manually. Orders can be approved at the **Process Orders** screen or in the **Multi Order Processor**.

Complete the following steps to approve an order:

1. Locate the appropriate order using the **Process Orders** window.
2. Click the **Approve** button. The system displays the **Print Options** window:



Note: *If the order is already approved, the program provides the ability to "un-approve" it. Certain functions cannot be performed on approved orders; they must first be un-approved before performing any changes, and then re-approve the order.*

3. Enter the number of **Sales Receipts**, **Packing Slips** and **Mailing Labels** to be printed by over-typing the values in the fields. Defaults for these fields are controlled by system

parameters **InvoiceCopies**, **PackingSlipCopies** and **LabelCopies**, which can also be set via the Printing and Report section of the Store Setup Wizard.

4. Check the **Shipping Label** box to print a shipping label. This requires the use and configuration of one of the internally supported major shipping carrier's software package, such as UPS Online Tools, ShipRush for FedEx, or Endicia DAZzle for USPS.
5. To enter the ship date for an order, type in the ship date, use the calendar icon, or click the **Today** or **Tomorrow** buttons. If you want to record the date shipped, select the **Store Date Shipped** check box.

Note: *The Expected and Actual Ship Dates may also be set at the fourth page of the Shipping section of the Store Setup Wizard, or they can also be set by the System Parameters; go to System Parameters> Shipping Parameter Group> and select* ***SetActualShipDate*** *and/or* ***SetExpectedShipDate.*** *Be advised that setting the actual ship date on import may interfere with Order Status Events that are used to trigger sending status information to the shopping cart or Order Status System. Please review those settings carefully before setting the ship date on import.*

6. Check the **Send Email Confirmation** box to send a message to the customer when the order is approved. Setting system parameter **ConfirmManualApprovals** equal to TRUE causes this box to be checked by default.
7. Choose an email template from the list in the **Select Template** tab. It is possible to modify the text of the email by overtyping the text in the **Edit Message** fields. Changes made in that manner only affect the current email, not the template used to create the message. To set a default for this field, choose a template from the drop-down list for system parameter **DefaultConfirmationTemplate**

Note: *The templates provided with the program are samples and can be modified to suit your business. Keep a copy of the original template. To modify the sample templates see* ***Editing an Email Template*** *in Chapter 2.*

8. Optional: Enter a **BCC** address to send a copy of the email to an additional person. This field is not tied to the system parameters EmailBCCAddress or EmailBCCAddress2 that are set via the Store Setup Wizard. Therefore this field is not pre-populated with either of those values. A copy of the email is still sent to the bcc address that is defined in the Store Setup Wizard, even if the BCC field on this form is left blank.
9. Click the **Do not print button** to approve the order without printing any documents, the **Print Now** button to print the selected documents immediately or the **Print Later** button to add the documents to the batch printing queue. Refer to ***Batch Printing***, in Chapter 10, for more information.
10. The system approves the selected order and sends a confirmation email and prints paperwork according to the selections made.

Canceling or Deleting an Order

It is possible to cancel or delete an order that will not be filled for some reason. For example, if an order is believed to be fraudulent or there is an order with an outstanding balance due for a long period of time and will probably never be shipped, those orders should be **canceled.**

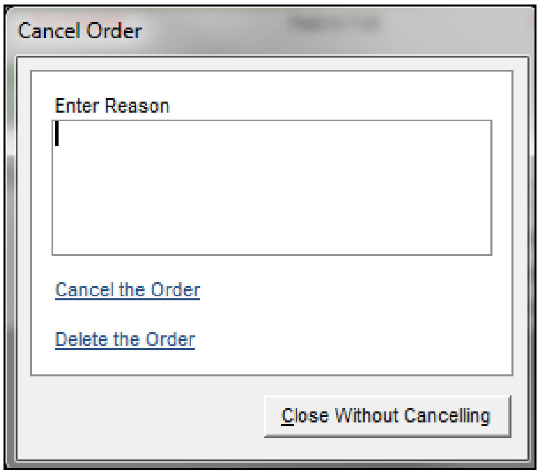
Canceled orders remain in the system. They cannot be filled or shipped. They do not appear in most searches unless specifically looking for that order, or if the program has been told to include canceled orders in the search. If it is decided at later date to ship the order, it can be **un-canceled** and processed**.**

Deleted orders, on the other hand, are completely erased from The Stone Edge Order Manager. For example, if an order is received that is clearly not valid and will never be shipped, it should be deleted. This is the case with orders that may not be imported properly due to an error during processing.

***Note:** The Delete option is only be available if the system parameter **AllowDeletingOrders** is set to TRUE*

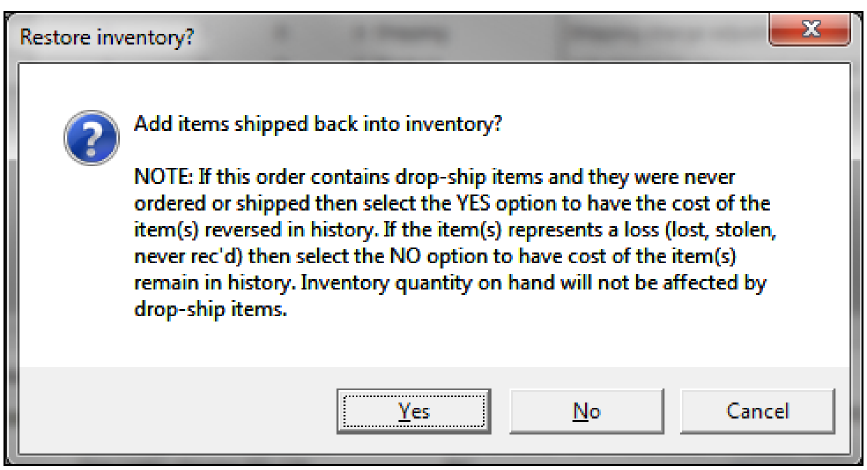
Use the **Cancel Order** button on the **Process Orders** accordion to cancel or delete an order, or to “un-cancel” a previously canceled order:

1. Locate the order to be canceled.
2. Click the **Cancel** button. The system displays the **Cancel Order** window.



***Note:** If the order was already canceled, The Stone Edge Order Manager prompts you to verify that the order is to be “un-canceled”, and how to handle backorders that may be on the order.*

3. Enter the reason for canceling the order in the **Enter Reason** field.
4. Select **Cancel the Order** or **Delete the Order**. The system displays the Restore Inventory dialog:



5. Respond **Yes** or **No**, and the program makes any necessary changes to inventory.

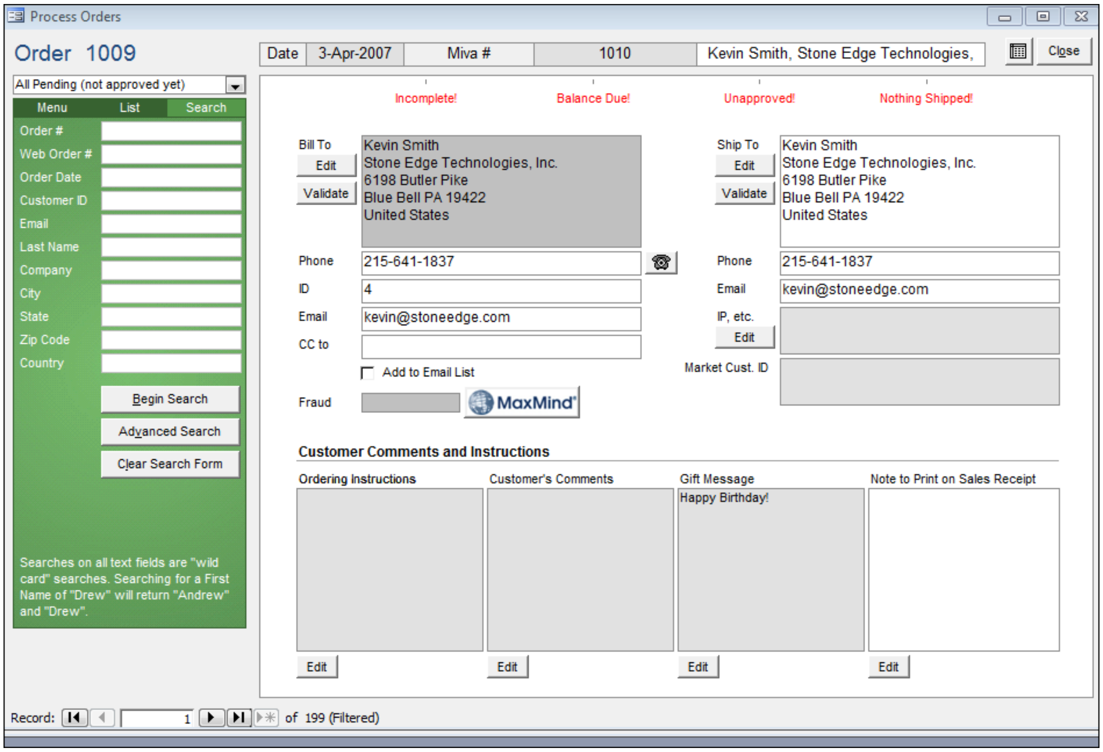
The system cancels or deletes the order, as appropriate.

Searching for Orders

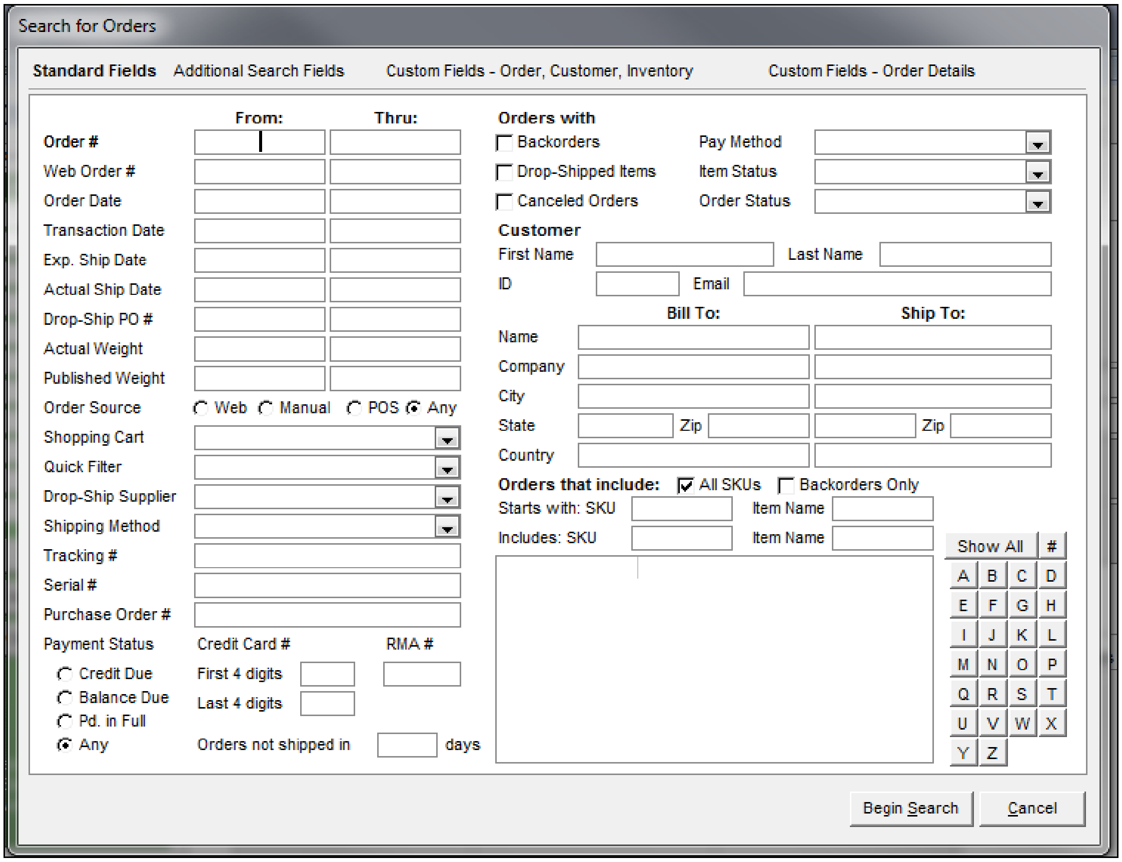
The Stone Edge Order Manager allows you to search for orders based on a wide variety of criteria, including customer information, dates, and which products were ordered, just to name a few.

Go to **Main Menu > Process My Orders > View & Process My Orders > Search**.

You can perform a simple search by entering values in any of the fields on the accordion and clicking **Begin Search**.



To search using other criteria, click **Advanced Search** .



Wild Card Searches

All data entered is treated as a “trailing wild card” search. For example, if you enter “Gold” for the last name, the program will find orders where the buyer’s last name is Gold, GOLDBERG, goldsmith, etc. To use a “leading wild card”, enter an asterisk (*) before the text string. For example, if you enter “*Gold”, the program will find the names Finegold and Marigold, as well as Gold, GOLDBERG, etc.

From: and Thru: Columns

The **From:** and **Thru:** columns can be used to limit the search for a range of order numbers, dates, etc. If data is only entered into the **From** field, the program finds records where that field is equal to or greater than the value you entered. Likewise, if only the **Thru** field contains data, the program looks for values up to and including the criteria that was entered.

When the search criteria are entered, click the **Begin Search** button. The system filters the orders based on the criteria and displays them in the **Process Orders** window.

There are four tabs with more fields that can be used as filters when searching for orders:

Standard Fields

Additional Search Fields

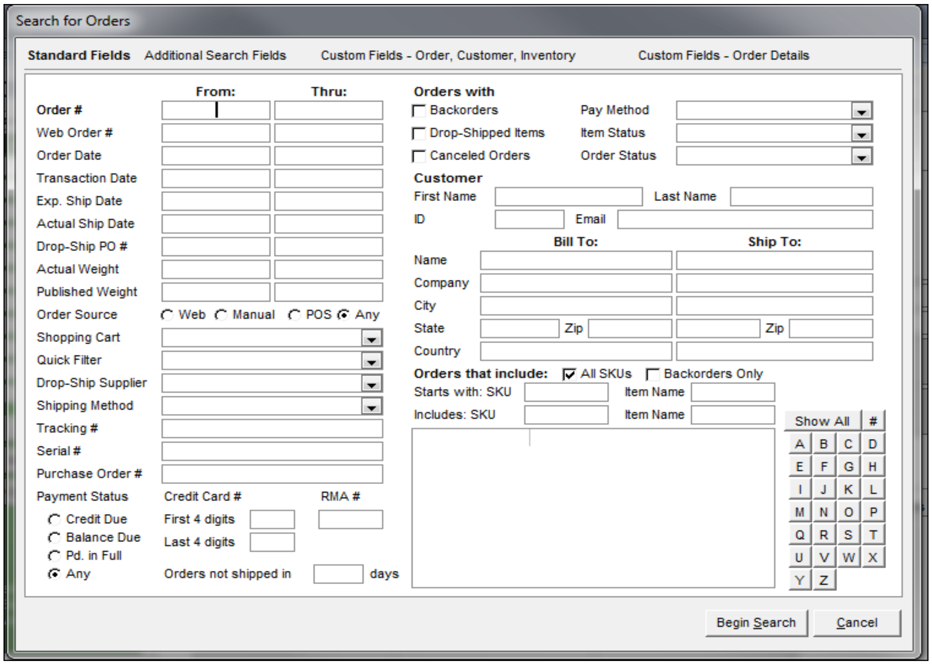
Custom Fields - Order, Customer & Inventory

Custom Fields – Order Details

Enter search criteria into any combination of fields on any of those tabs. If criteria are entered into more than one field, the program searches for orders that match ALL of the criteria entered. The more information that is entered into these fields, the more specific the results will be.

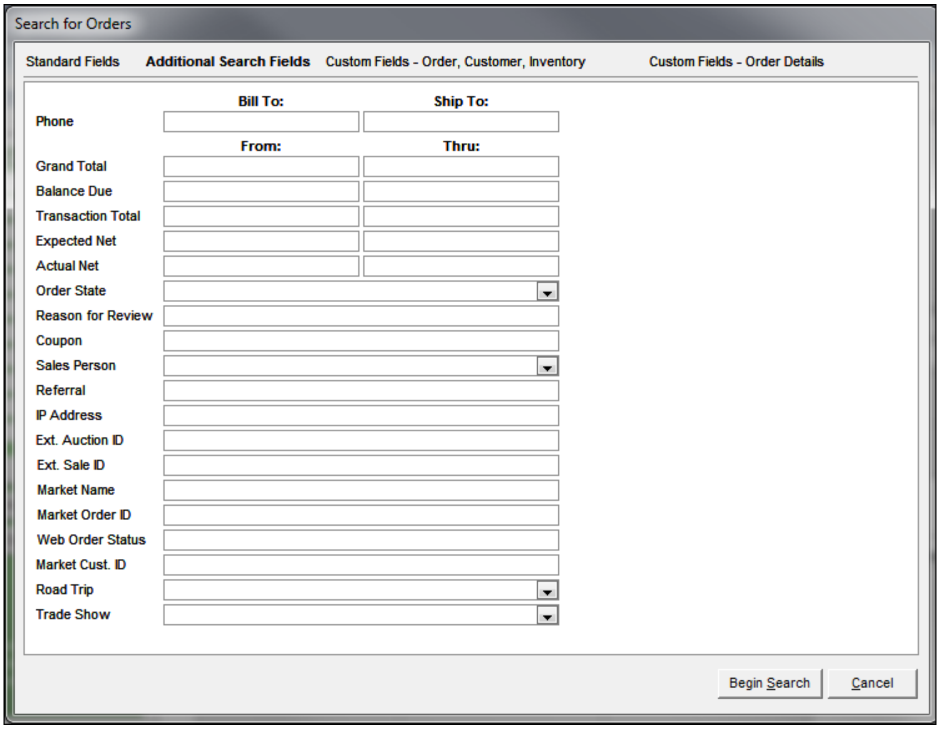
Note: *Searches in The Stone Edge Order Manager are not case sensitive.*

Standard Fields Tab



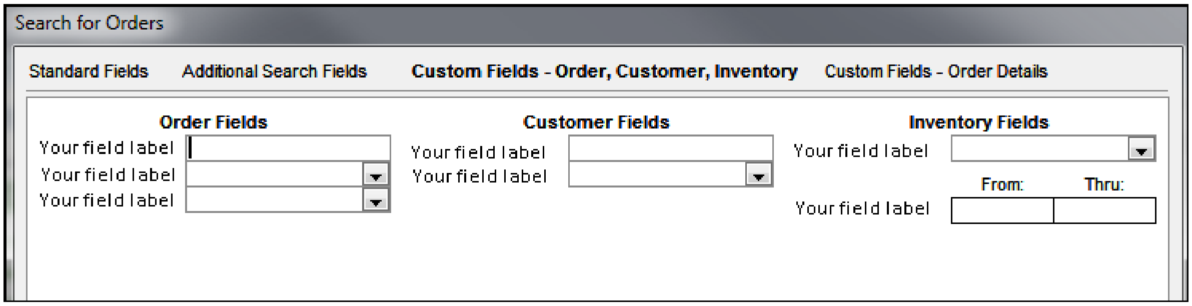
The **Standard Fields** tab has the most common search fields, including customer name and address, payment and status data, various date fields, and which products where ordered.

Additional Search Fields Tab



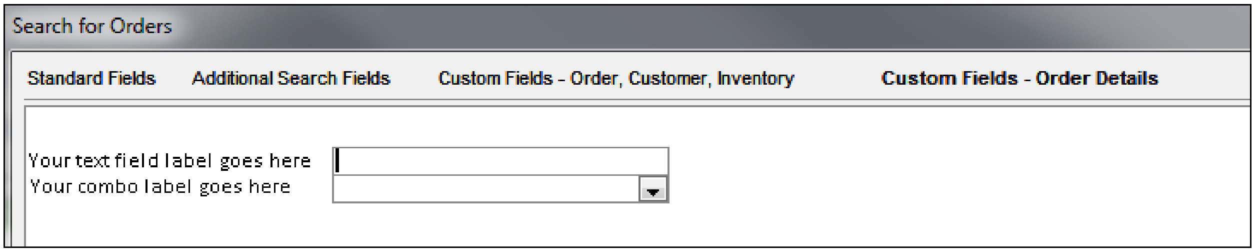
The **Additional Search Fields** tab permits searching based on customer phone number, order amounts, coupons, eBay Auction IDs, etc.

Custom Fields - Order, Customer, Inventory Tab



The **Custom Fields - Order, Customer, Inventory** tab allows any custom order, customer or inventory fields that have been defined to be used as search criteria. Refer to ***Managing Custom Fields***, in Chapter 2, for more information on configuring custom fields.

Custom Fields – Order Details



The **Custom Fields – Order Details** tab displays custom order details fields which have been defined in Stone Edge to be used as search criteria. Refer to ***Managing Custom Fields***, in Chapter 2, for more information on configuring custom fields.

Processing Back Orders

A **Backorder** occurs when an order is received for one or more items that are temporarily out-of-stock. When that happens, either partial-ship any items that are in stock and fill the rest of the order later, or hold the entire order until everything can be shipped. Backorders can be managed one order at a time at the **Process Orders** screen or in batches at the **Fill Backorders** screen. See ***Batch Filling Back Orders*** later in this chapter for more information.

Filling Back Orders

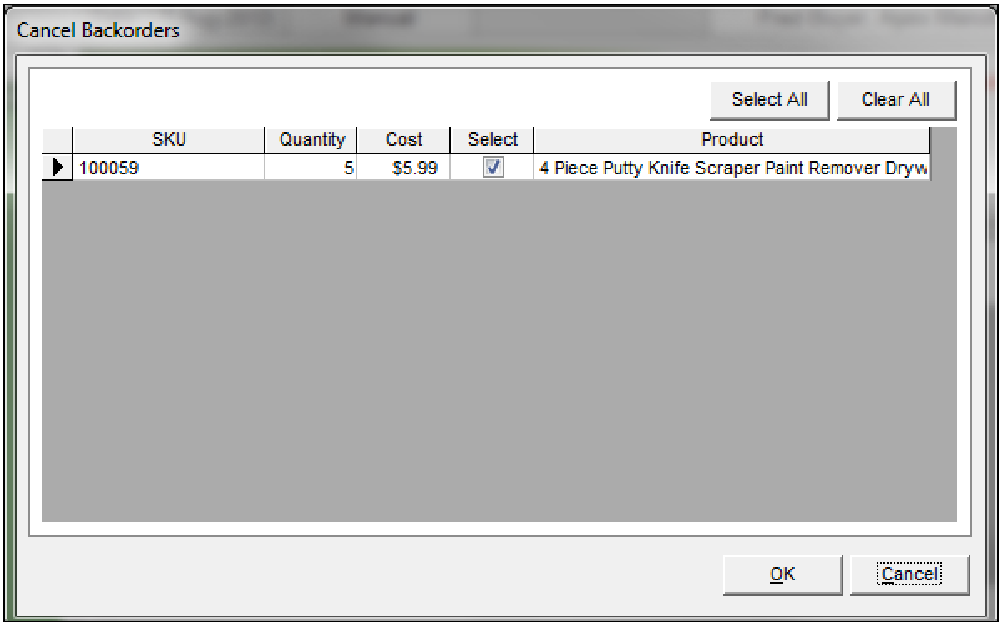
If backordered items have been received into inventory, orders for those items can then be filled by using the Quick Filter, **Backorders to be Filled** or by using the **Search** button on the Process Orders accordion to produce a list of orders with back-orders for a selected product or products. Scroll through the list of orders using the navigation arrows at the bottom of the screen and click the **Fill Backorder** link on the accordion for each individual order. The system fills all backordered items on the order which are now in stock. Use the navigational arrows at the bottom of the screen to scroll through the group of orders.

If backorders are filled for an *unapproved* order, the system assumes that nothing has been shipped and fills the backorder in the original order. If backorders are filled in an *approved* order, the system assumes that some of the items have already been shipped and it creates a new order record to fill the backorders. A note containing the related order numbers is added to both orders for future reference.

Canceling Back Orders

If an item has been backordered, and the customer decides that he or she no longer wants the item, or if the item is no longer available and the customer does not want to exchange it for something else, select the item in the list of order details, then click the **Cancel Backorders** link on the **Items** tab. The system displays the **Cancel Backorders** window: Check the boxes in the **Select** column to indicate which back ordered items are to be canceled. Then click **OK** to cancel the back-orders.

Use the **Select All** button to have all items in the list selected for cancellation, or conversely, click the **Clear All** button to un-check all items as being selected for cancellation.

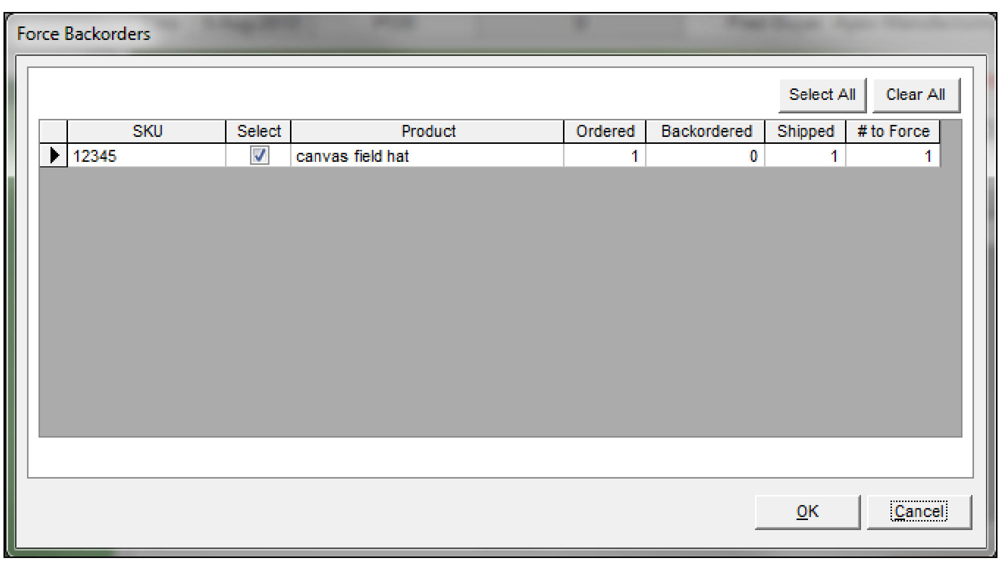


The Stone Edge Order Manager leaves the line item in the order, but cancels the backordered quantity (the amount showing in the **BO** column). The system will no longer attempt to fill that portion of the order when the **Fill Backorders** link is clicked.

Forcing Back Orders

If The Stone Edge Order Manager indicated that an item was in stock when it actually was not, or if the program has been set not to check inventory, but one or more items need to be backordered, it is possible to **force** a backorder. Complete the following steps to force backorders:

1. Select the line item on the **Items** tab of the **Process Orders** screen and click the **Force Backorder** link on the accordion. The system displays the **Force Backorders** window:



2. Click the check box in the **Select** column to indicate the items should be force backordered.

Use the **Select All** button to have all items in the list selected, or the **Clear All** button to deselect all items in the list..

3. Enter the quantity to place on backorder in the **# to Force** column of a given line item.
4. Click the **OK** button.

The system decrements the quantity shipped for that item by the back-ordered quantity. The next time The Stone Edge Order Manager fills backorders, it will fill the forced backorders if those items are now on hand.

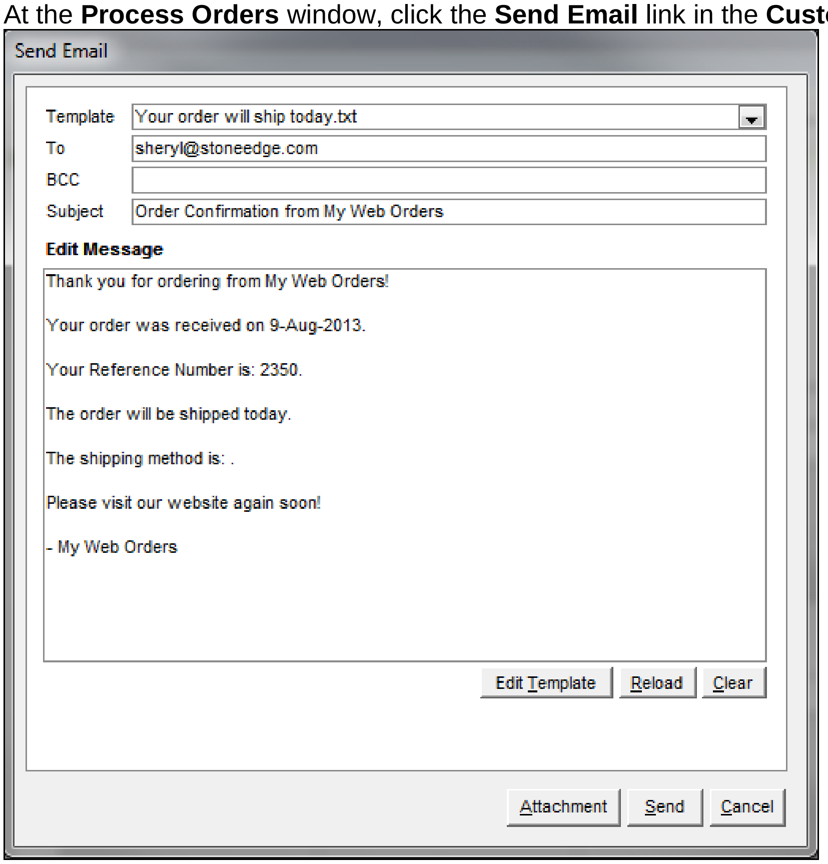
Showing/Hiding Kit Parts

The **Hide Kit Parts** link on the **Custom** tab of the **Process Orders** screen controls whether kit parts are hidden or visible at **Process Orders**. Set the default state of that button by using the system parameter **DefaultShowKitParts**.

Sending Email Messages to Customers

The **Send Email** link on the **Customer** tab of the **Process Orders** accordion allows you to send a message to the customer.

1. At the **Process Orders** window, click the **Send Email** link in the **Customer** tab..



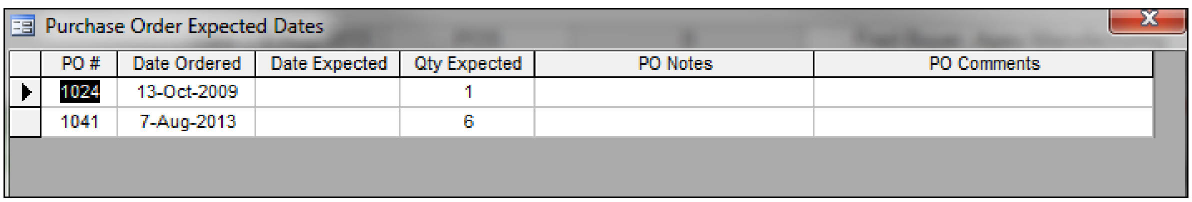
2. The “**To**” email address is filled in automatically with the Bill To email address from the current order. If the system parameter **AllowChangeEmailAddress** is set to TRUE the address can be changed by editing it directly in the **To** field.
3. To send a blind carbon copy of the message to a separate email address (without the customer seeing the address in the distribution list), enter an address in the **BCC** field. This field is not associated with the BCC address field that is specified in the Email section of the Store Setup Wizard and therefore is not be pre-populated with that value. However, an email is still sent to the bcc address defined in the Store Setup Wizard, even if the BCC field on this screen is left blank.

4. Select an email **Template** from the drop-down. To set a default template, choose one from the drop-down box of the system parameter **DefaultConfirmationEmail**.
5. Edit the email message by overtyping the text if necessary. Any changes made in this fashion only affect the current email message, not the template itself. Use the **Reload** button to "un-do" the changes or restore the message to its original form
6. To write and send a message that is not based on a template, click **Clear** on the **Edit Message** tab. Then enter the subject and message in the spaces provided there.
7. To make changes to the currently selected email template, click the **Edit Template** button. If changes had been made to the text of the email previously, those changes will be lost when the **Edit Template** button is clicked. Changes made to the email template itself *will* be permanent when the **Save** button is clicked. Click the **Reload** button to un-do any changes that have been made to the template prior to clicking the **Save** button.
8. Click **Send**. The system displays a confirmation message. Click **OK**.

The system sends the email to the customer and the BCC address, if specified.

Viewing Purchase Orders for Items that are On Order

The **On Order** link on the **Items** tab of the **Process Orders** screen allows you to quickly view any outstanding purchase orders for the selected line item in the **Purchase Order Expected Dates** window:



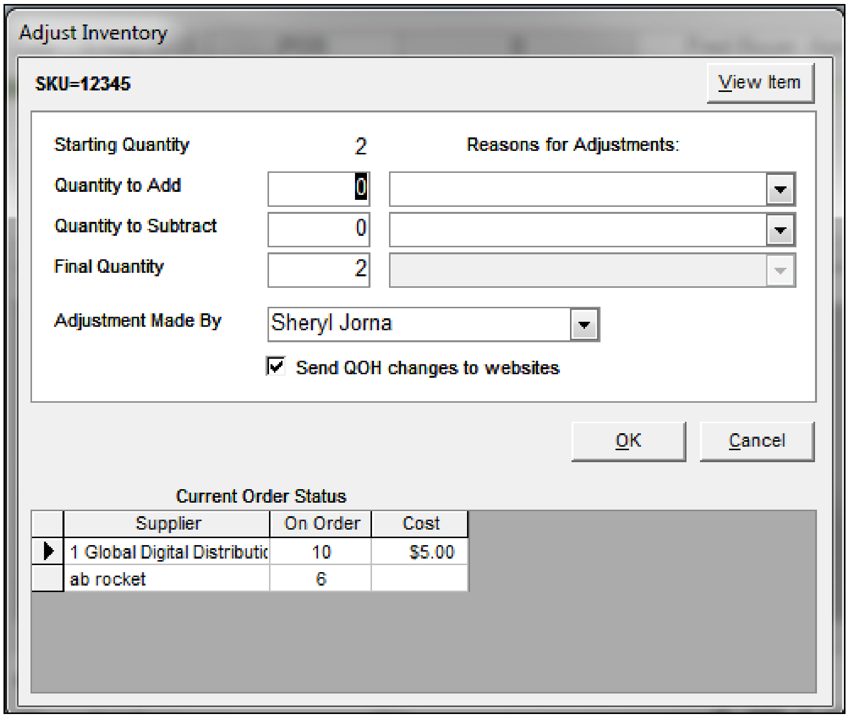
PO #	Date Ordered	Date Expected	Qty Expected	PO Notes	PO Comments
1024	13-Oct-2009		1		
1041	7-Aug-2013		6		

This window shows information about all open purchase orders for the selected line item, so you can see when back ordered items should be available, etc.

Adjusting Inventory QOH while Viewing an Order

The **Adjust QOH** link on the **Items** tab of the **Process Orders** screen permits you to quickly view and edit the quantity on hand for the selected line item.

1. Select an SKU by clicking anywhere on that line item in the **Process Orders** window.
2. Click the **Adjust QOH** link. The system displays the **Adjust Inventory** screen:



3. The **View Item** button opens the Inventory record of the selected item.
4. Either enter the **Quantity to Add, Quantity to Subtract**, or enter a number directly into the **Final Quantity** field.
5. If the **TrackInventoryAdjustment** system parameter is set to TRUE, you must select or enter **Reasons for Adjustments** and choose a name in the **Adjustment Made By** drop-down list. Create reasons for adjustments in the QOHReason list. Refer to *Setting System Parameters* and *List Maintenance* in Chapter 2 for more information.
6. The **Send QOH changes to websites** check box controls whether quantity on hand changes made here should also be sent to the shopping cart(s). This requires that The Stone Edge Order Manager is already configured to synchronize quantity on hand with the merchant's shopping cart(s) which supports that functionality. For more information on the topic, see the online Knowledge Base article, ***Inventory Synchronization***, and the ***Shopping Cart Matrix.***
7. If the selected product is a Lot that is made up of different SKUs, the **Transfer Inventory** button on the **Adjust Inventory** window allows inventory to be transferred from those lots to the single-piece products. Refer to ***Transferring Inventory***, in Chapter 3, or more information.
8. Click **OK** when finished.

Order States

The Order States feature permits the assignment of certain "states" to an order, such as Layaway or On Hold. You can define what functions or "Operations" can be performed against orders in each order state. For example, the program can be configured to prevent On Hold orders from being approved or prevent Layaway orders from being shipped.

The Stone Edge Order Manager has four preset order states that cannot be deleted: **Layaway**, **On Hold**, **Quote**, and **Sale**. It is also possible to define your own order states.

The state of an order can be viewed and edited at the **Process Orders** screen by users with the appropriate permissions. It is also displayed at the **Multi Order Processor** screen.

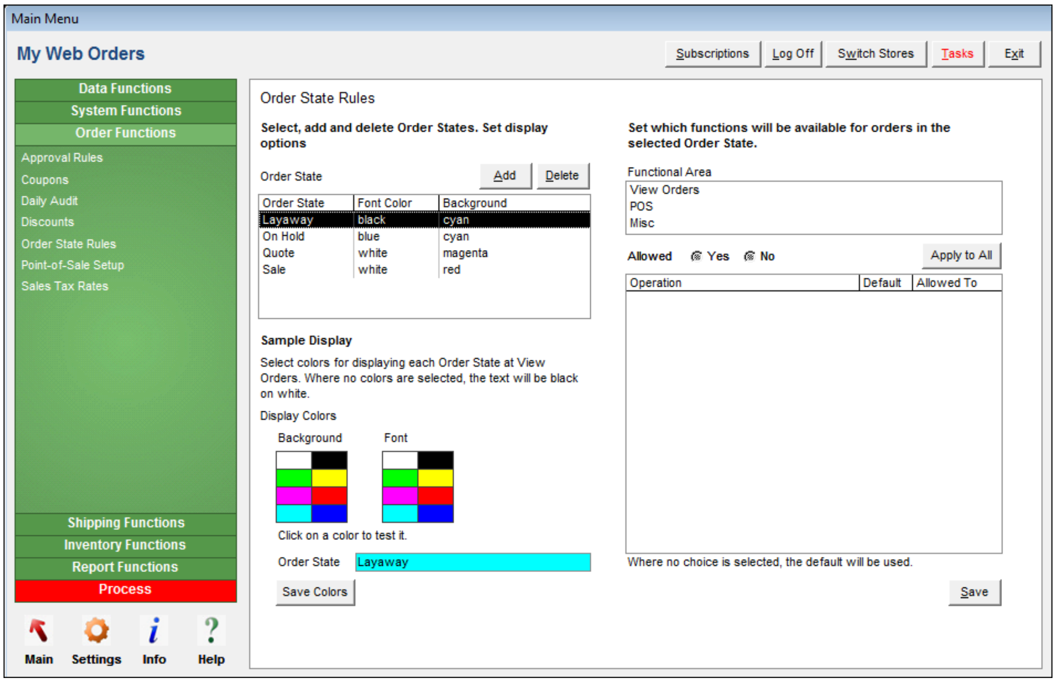
The **On Hold** order state is included in the **Quick Filter** drop-down list on the **Process Orders** screen. Order states are searchable criteria in the **Additional Search Fields** tab of the **Search for**

Orders screen. Order states can also be highlighted with different colors to help draw your attention to critical states.

Order States can be set based on Approval Rules and there is an Order States report that you can print to see a list of orders in a selected order state, or all orders where the order state is set to anything but Sales (which is the same as no state set).

Note: *Do not confuse "order state" with "order status". The order state is used in-house to track the progress of an order and to control what functions can be performed at each step along the way. The order status is similar, but is used to inform customers of what is happening with their orders.*

To open the **Order State Rules** screen, go to the **Main Menu > Settings > Order Functions > Order State Rules**.



In the box on the left side of the screen, select, add, or delete the display options for order states. Once a state has been added or selected, its rules can be defined on the right side of the screen.

This section contains the following topics.

- Preset Order States
- Adding a New Order State
- Setting Up Order State Rules
- Setting Display Colors

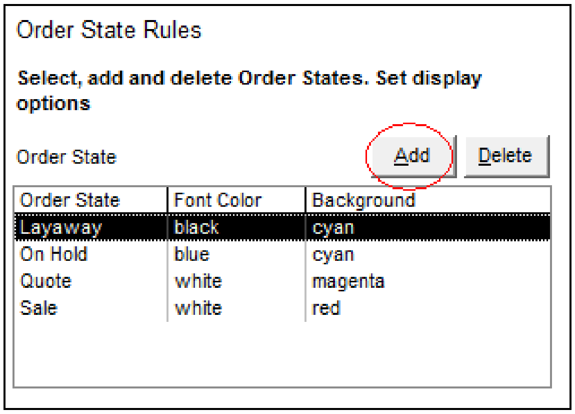
Preset Order States

There are four preset order states that cannot be deleted: **Layaway**, **On Hold**, **Quote** and **Sale**. These preset Order States all have default settings for every **Operation** that is available in each of the possible **Functional Areas**. If an operation is not defined by the user, the program uses the default setting.

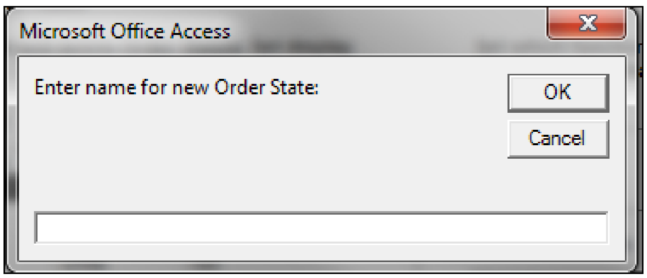
Note: *The "Sale" state is the same as having no order state set; there are no restrictions on what actions can be taken against an order in this state. The only setting that can be altered for the "Sale" state is changing the display colors.*

Adding a New Order State

1. To create a new (custom) order state, click the **Add** button.



2. Enter a name for the state. Click **OK**.



3. The newly created order state appears in the list and in the **Order State** text box.
4. Optional: After creating an Order State, go to the right side of the screen to alter rules for some or all of the available Operations in each of the three Functional Areas (Process Orders, POS, or Misc). Each newly created Order State has the same Operations and default settings as the preset Order States, which can be customized to suit the business needs. Refer to the next section, *Defining Order State Rules*, for more information.

Defining Order State Rules

The Order State rules tell the program which functions (called "Operations") can or cannot be executed in a particular Functional Area for a given order state. The Operations are divided into three Functional Areas: Process Orders, POS (Point of Sale) and Miscellaneous

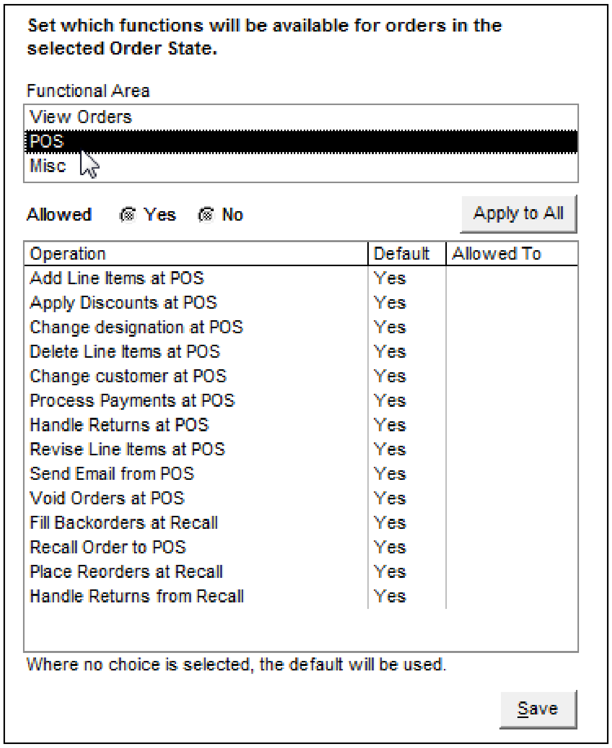
Many of the Operations listed at this screen are also controlled by system parameters. For example, there is a system parameter called **AllowAddLineItem**. Most of the Operations can also be controlled by The Stone Edge Order Manager's security system. Here's how they all work together:

First the security system is checked. If the Operation is not allowed, no further checking is done and the operation will not be performed. If it is allowed under the security system settings, the system parameters are checked next. Again, if an Operation is not allowed according to the setting of the system parameter, no other checking is done and the operation is not performed. Finally, if the operation is still allowed after checking the security settings and system parameters, the Order State rules will be checked before the operation is carried out.

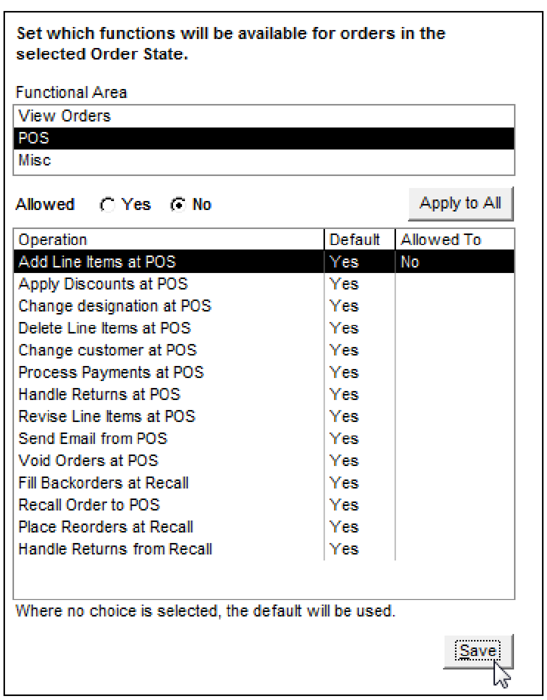
In most cases, if an operation is not allowed because of an order state rule, the program will tell you the state of the order and the operation that was not allowed. Some exceptions are: 1) if filling backorders, sending emails or processing orders in bulk or batch mode (Fill Backorders, Multi-Order Processor), orders that are in a state where those operations are not allowed will be skipped with no warning 2) operational buttons may not be visible based on operational settings for the order state, for example, the Delete Order button may not be visible when canceling an order.

To define rules for an Order State:

1. Select an **Order State**.
2. On the right side of the window, choose a **Functional Area** to display the list of Operations that are available in that area. Each Operation has a default setting as shown in the Default column: Yes, if it's allowed or No, if it's not allowed. (This column is not user modifiable and provides a reference of the program's default settings.)



3. Select the **Operation** to be changed from its default setting. Click the **Yes** or **No** radio button in the **Allowed** section of the form and click the **Save** button. The newly assigned setting is displayed in the **Allowed To** column and the **Allowed** radio button reflects the chosen setting.

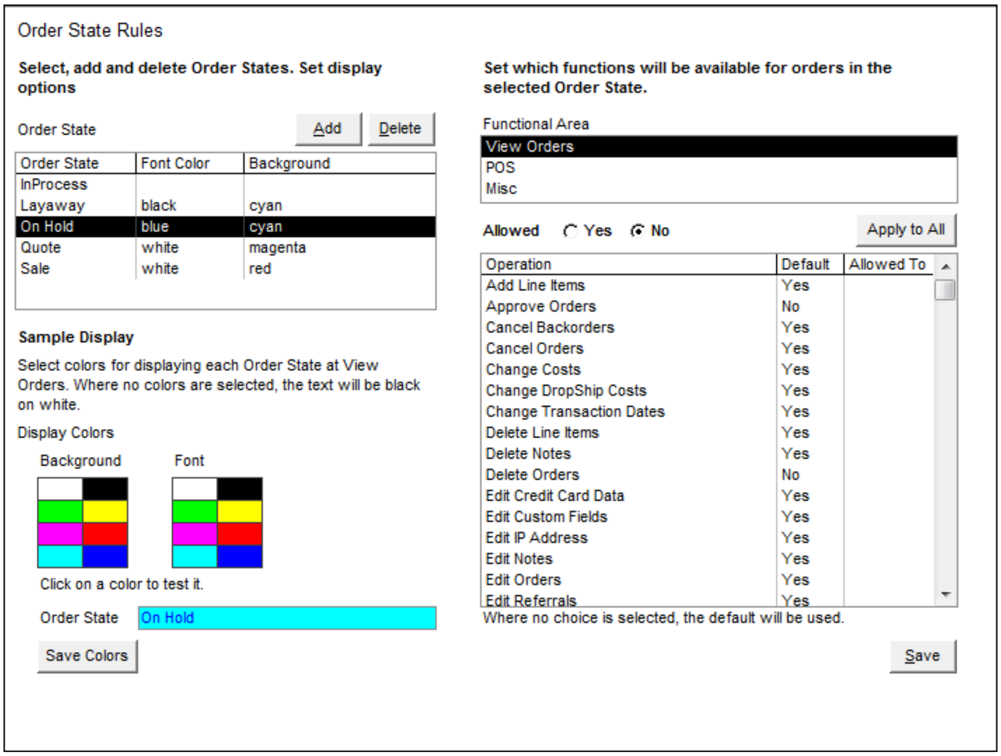


4. Repeat these steps for any Functional Area where you want to change the default Operation settings.
5. To change the settings for all of the Operations in a given functional area to the same value simultaneously, select an **Operation**, click the desired **Allowed** status (Yes or No) and click the **Apply to All** button.

Setting Display Colors

Display colors are used to enhance the visibility of an order's state when it is being viewed and can be customized by you.

1. Select an **Order State** from the list of states in the Order State Rules form. In this example, On Hold has been selected.



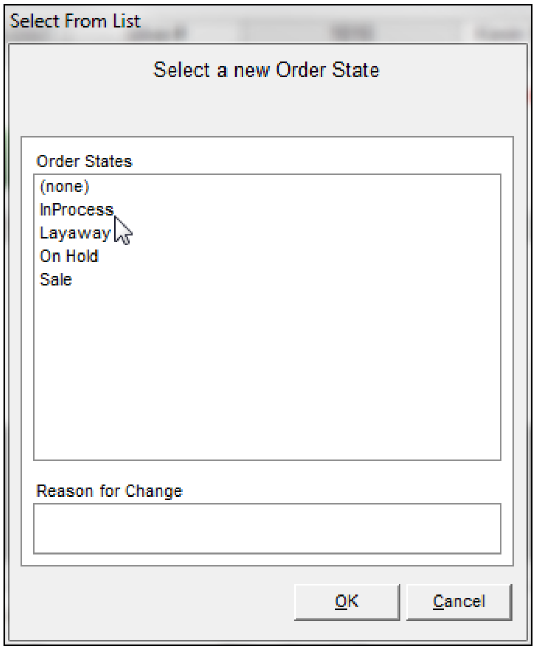
2. Click on a color in the **Background** and/or the **Font** color palettes. The **Order State** field in the Sample Display section of the form shows the chosen color combinations, allowing you to view the settings before saving them.
3. When satisfied with the selections, click **Save Colors**.

Changing the Order State of an Order

The Order States feature allows you to assign certain "states" to an order, such as Layaway or On Hold. The Order State is displayed in the **Addresses** tab of the **Items** tab at **Process Orders**:

To manually change the Order State of an order:

1. Click the **Order State** link and select the desired order state from the drop-down list.
2. Optional: Enter a **Reason for the Change**.
3. Click the **OK** button.

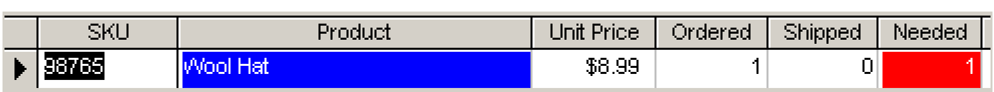


To set the Order State automatically upon import, refer to the section entitled *Approval Rules,* later in this chapter for more information.

Managing Line Items for an Order

When viewing an order, aside from the functions that can be performed on the entire order, there are several functions that can be performed on the individual *line* items in that order.

Color can be used to draw attention to backordered items, those being drop shipped, and items containing regular or freeform options by setting the appropriate system parameters. Search for parameters beginning with **ViewOrdersHighlight** in the Set System Parameters window.



SKU	Product	Unit Price	Ordered	Shipped	Needed
98765	Wool Hat	$8.99	1	0	1

This section discusses the following line item functions:

Add a Line Item

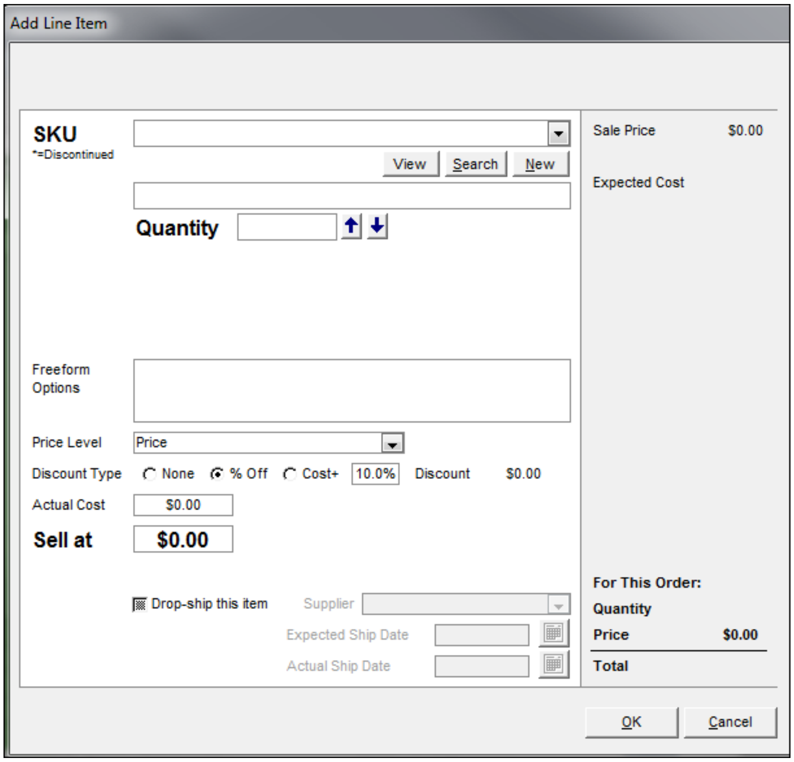
Delete a Line Item

Revise a Line item

Returns, Exchanges and RMAs

Adding a Line Item

1. Click the **Add Line Item** link on the **Items** tab of the **Process Orders** screen to add a line item to the current order.



2. Adding line items to an existing order is similar to adding line items to a manually entered order. First, enter the product in the **SKU** field – either by selecting from the drop-down list, by searching the database, or by adding a **New** product SKU – and enter the **Quantity**.
3. Once a product SKU is selected, edit the **Sell At** price, apply any discounts, etc.
4. To view the details for a product at the Inventory screen, select its **SKU**, click the **View** button.
5. The **Search** button opens the **Search Inventory** form and the **New** button opens the **Add New Product** form. Either of those methods can be used to add a line item to an order.
6. Click **OK** to add the item to the order.

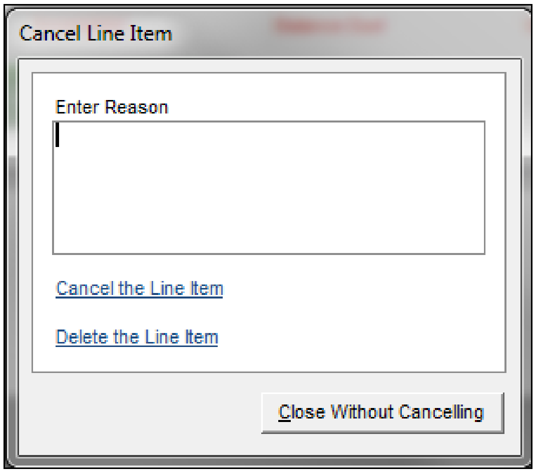
Deleting or Canceling a Line Item

The **Delete Item** link on the **Process Orders** form allows you to cancel or delete an item from an order; however, it is suggested that items marked as shipped should not be canceled or deleted. Shipped items should be returned or exchanged (see the section ***Returns, Exchanges and RMAs*** *below)*.

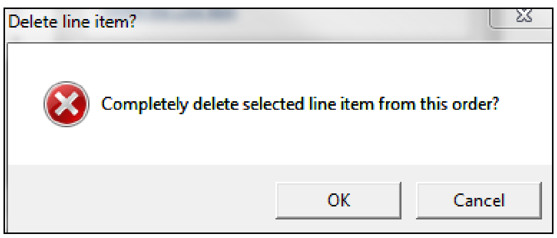
Complete the following steps to cancel or delete a line item from an order:

1. Locate the appropriate order in the **Process Orders** window
2. Select the line item to be canceled or deleted by clicking anywhere on its row.

3. Click the **Delete Item** link in the **Items** tab accordion. The system displays the **Cancel Line Item** window for the selected line item:



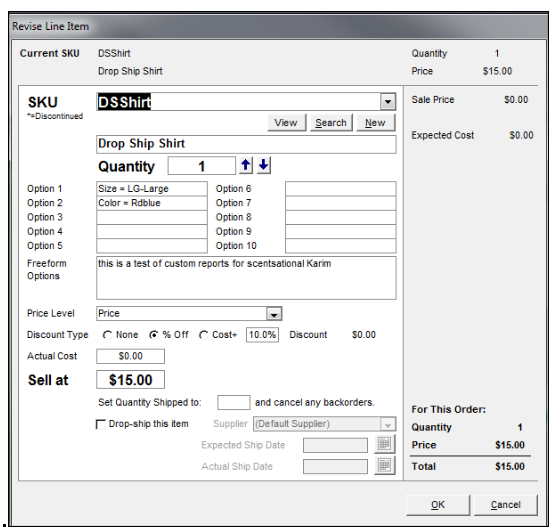
4. Enter the reason for canceling the item in the **Enter Reason** field.
5. Click either **Cancel the Item** or **Delete the Item** to effect the appropriate action. If the item is canceled, the program leaves the item on the order but marks it as CANCELED and adjusts the totals accordingly. If the item is deleted, the system displays the **Delete Line Item** confirmation dialog:



6. Click **OK** to permanently delete the selected line item from the order.

Editing a Line Item

Revising a line item for an order is similar to adding a line item to an order. Click the **Edit Line** Item link in the **Item** tab accordion to open the **Revise Line Item** window and view the line items for the selected order.



.

Make changes to the selected line item, such as the quantity or price, whether it should be drop-shipped, etc., or change the SKU entirely.

Click **OK** when finished and the program makes the adjustments to the order.

Returns, Exchanges and RMAs

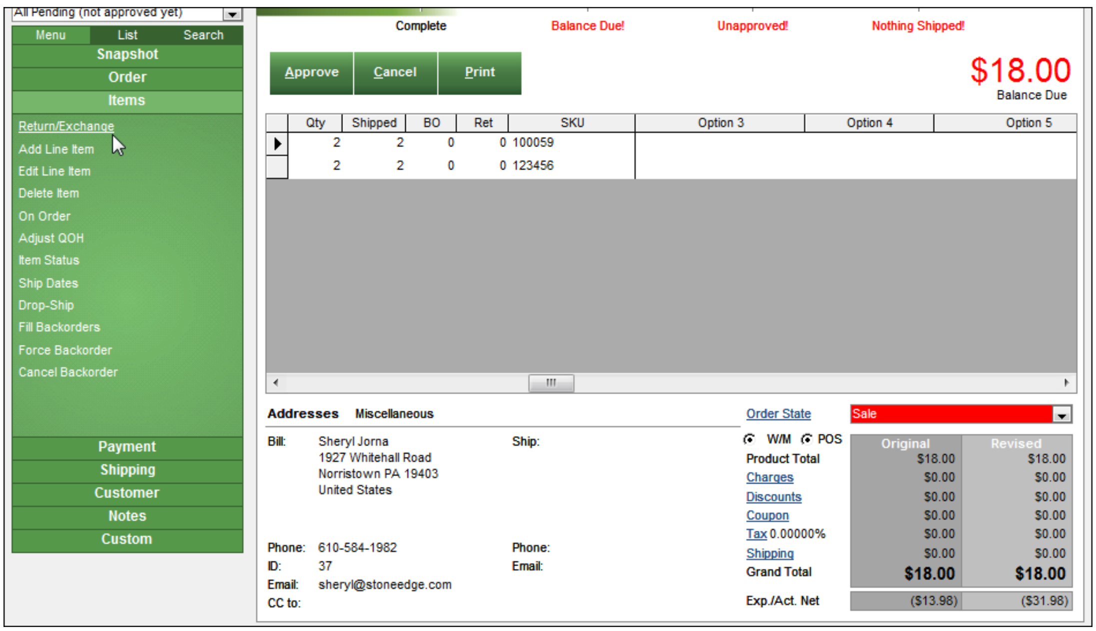
A **Return** occurs when the customer sends an item back for a credit or refund, and no replacement product is sent.

An **Exchange** occurs when the customer returns an item and a replacement *is* sent to them. It can be the same item or a different item.

Both returns and exchanges may result in additional charges or credits to the customer.

An **RMA** (Return Merchandise Authorization) is an authorization for the return or exchange, given to the customer before they send the item(s) back to the merchant. RMAs help you keep track of returns and exchanges.

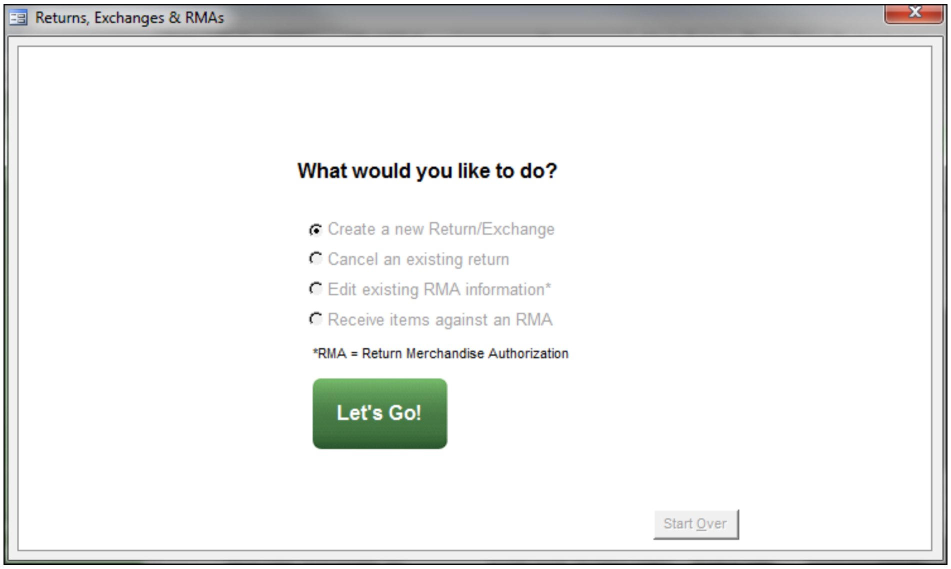
To process returns and exchanges, click the **Return/Exchange** link on the **Items** tab of the **Process Orders** screen.



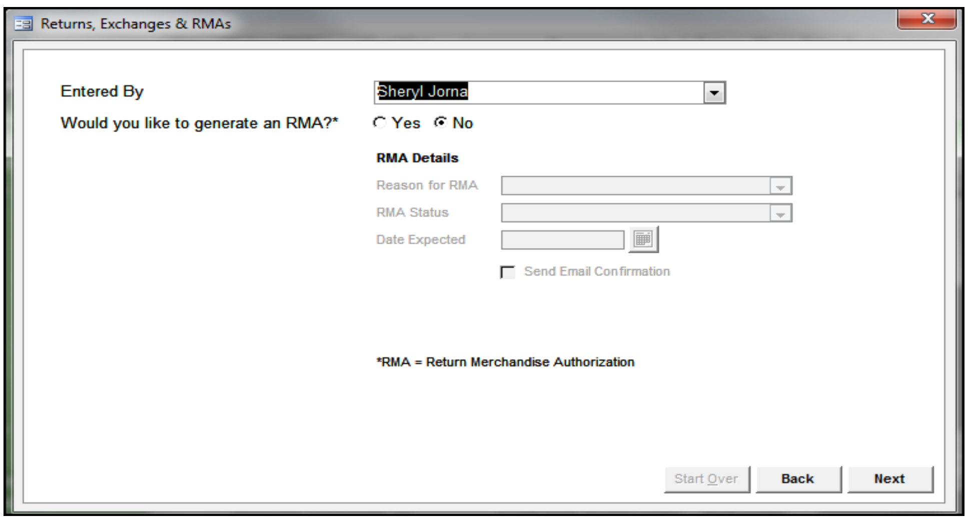
Processing a Simple Return (with no RMA)

1. Go to **Main Menu > Process My Orders > View & Process My Orders**.
2. Navigate to the correct order by using the scroll arrows at the bottom of the screen or by searching for the order.

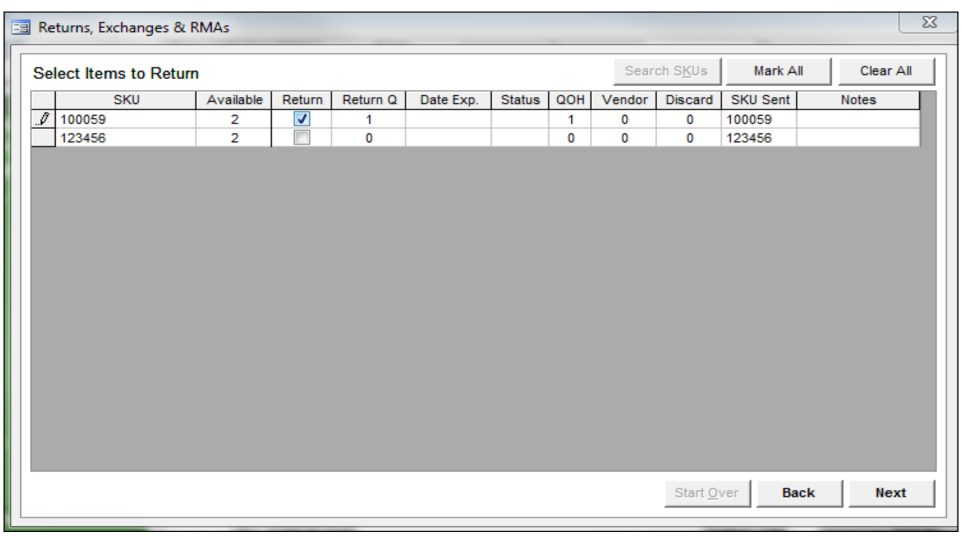
3. Select the **Items** tab and click the **Return/Exchange** link in the accordion to open the **Returns, Exchanges and RMAs** wizard.



4. Click **Let's Go!** to begin entering data about the return.



5. Select the name of the person processing the return and click **Next.**



6. Select the **Return** box for any items being returned and also enter the quantity returned in **ReturnQ**. Tell the program how to handle the changes to inventory by altering the values in the **QOH**, **Vendor**, or **Discard** fields. **QOH** refers to Stone Edge inventory, **Vendor** refers to an item returned to a supplier, and **Discard** means that the item cannot be resold and is destroyed.
   - The sum of the **QOH**, **Vendor** and **Discard** fields *must* equal the number in the **Return Q** for each item.
   - If the customer was sent the wrong product, enter the actual SKU they received in the **SKU Sent** column. The **Search SKUs** button is activated after clicking in the **SKU Sent** column. Click it to open the Search Inventory screen. Enter search criteria to locate the desired SKU.
   - Optional: Add any notes specific to each line item in the **Notes** column.

Note: *The system makes QOH and cost-of-goods changes based on this information. If the replacement SKU does not have sufficient QOH to fill the exchange request you are notified. You are prompted for verification before the system adds the SKU to the exchange item list.*

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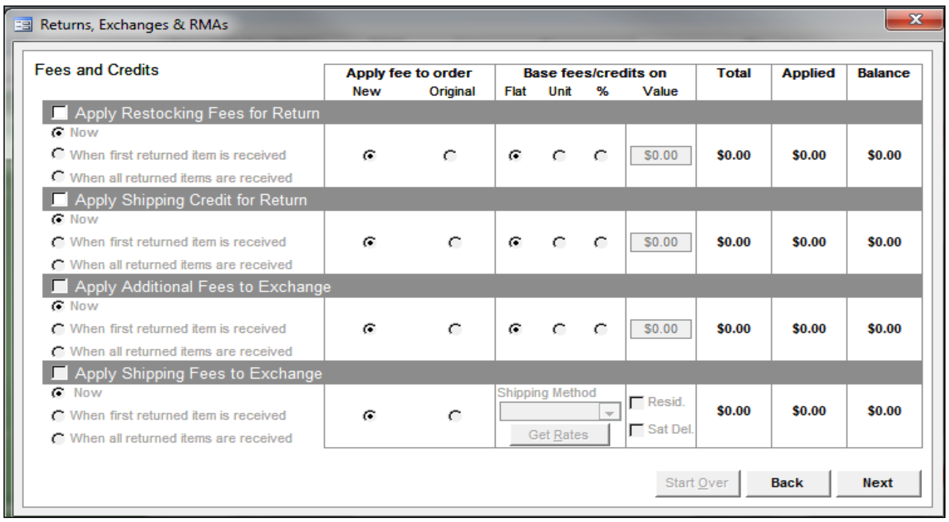
7. Click N**ext.**



8. Enter any fees that apply to the return or exchange.
   a. **Apply Restocking Fees for Return** – Available for **Returns** and **Exchanges**.
   b. **Apply Shipping Credit for Return** – Available for **Returns** and **Exchanges**.

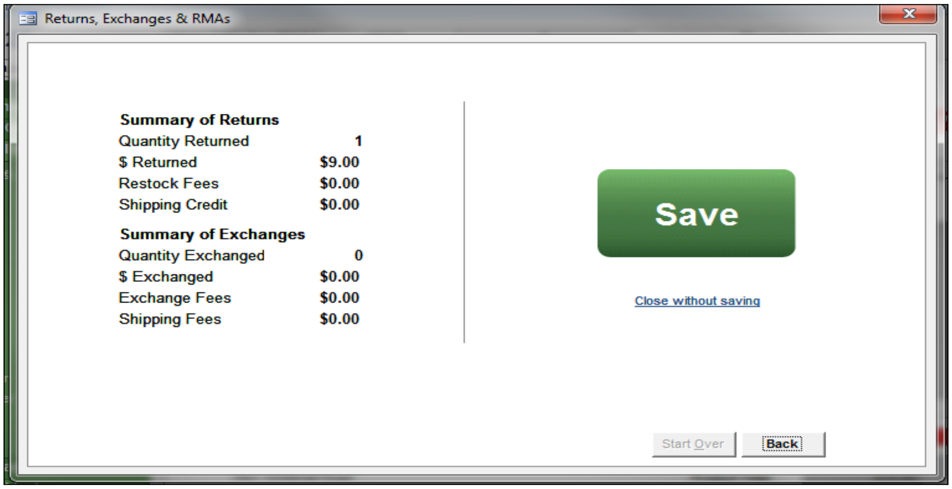
For each fee or credit selected, select a calculation method under **Base fees/credits on** and enter a **Value**. (Defaults for these options can be preset in the **System Parameters,** See list of parameters earlier in this section.) Below is a description of the Fee/Credit Basis types:

i. **Flat Amt.** – The **Value** entered represents the dollar amount to charge regardless of the value of the returned item(s).

ii. **Per Unit** – The **Value** entered represents the dollar amount to charge for *each unit* returned.

iii. **% of Amt.** – The **Value** entered represents a percent of the purchase price of all items returned.

9. Click **Next.**



10. Review the information on this page. Click Back if you need to make a change. Click **Save** when finished. The system displays the original order in the **Process Orders** window with the item marked as **Returned** (the quantity deducted from the order total). A **Note** is added to the order indicating the action taken.
11. Since the item was already paid for, a **Credit Due** is indicated. To issue the credit:
    a) If the original payment was made with a credit card and charged through The Stone Edge Order Manager, go to the **Payment** tab, click **Get data from order**, and select **Transmit** to have the credit card gateway issue the credit to the customer's credit card.
    b) If the original payment was made by check, COD, or credit card outside of The Stone Edge Order Manager, the credit must be issued manually (e.g., by sending the customer a check). Once that has been done, go to the **Pricing** tab and click the **Log Credit Issued** button. Fill in the information on the form to record the credit.

Processing a Simple Exchange

Returns and exchanges can be processed with or without a Return Merchandise Agreement (RMA). Complete the following steps to perform an exchange *without* generating an RMA:

1. At the **Process Orders** screen, display the order containing the item being exchanged.
2. Click the **Return/Exchange** link.
3. Click **Let's Go!**
4. Select the name of the staff member creating the exchange from the **Entered By** drop-down.
5. Click **Next.**
6. Select the items being exchanged by checking the **Return** box and entering the quantity being returned in **Return Q**.
7. Optional: Enter the date the item is expected to be received from the customer in the **Date Exp.** field.
8. Optional: Select an item **Status**. Refer to ***List Maintenance***, in Chapter 2, for information on defining item statuses.
9. Enter the quantity to put back into the Stone Edge inventory (items that can be resold) in the **QOH** column.
    a. If the item was drop-shipped to the customer, but it was sent back to the merchant rather than the drop-ship vendor, enter the number returned in **QOH**.
10. If the customer is returning the items to the drop-ship vendor, enter the quantity of re-sellable

items in the **Vendor** column.

11. If the items are damaged or cannot be resold, enter the quantity in the **Discard** column.

Note: *The sum of the **QOH**, **Vendor**, and **Discard** fields must equal the number in **Return Q** for each item.*

12. Click **Next.**
13. If the customer was sent the wrong product, enter the actual SKU that they received in the **SKU Sent** column. The **Search SKUs** button is activated after clicking in the **SKU Sent** column. Click the **Search SKUs** button to open the Search Inventory screen. Enter search criteria to locate the desired SKU to enter in the **SKU Sent** field. Select the correct item and click **OK – Use Selected Items**.

Note: *The system makes QOH and cost-of-goods adjustments based on this information. It notifies you if the replacement SKU has insufficient QOH to fill the exchange request. You are prompted for verification before the system adds the SKU to the exchange item list.*

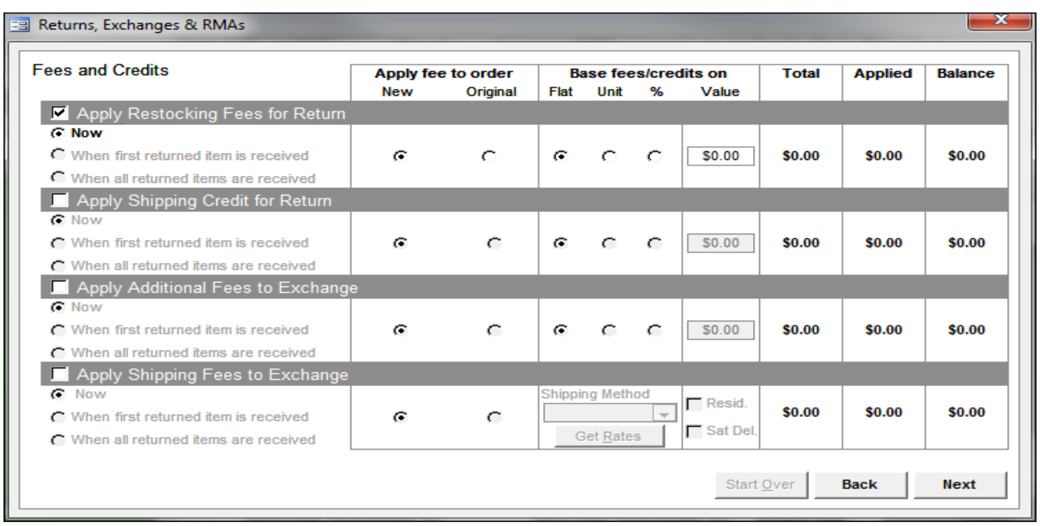
14. Optional: Add any notes specific to each line item in the **Notes** column.
15. Click **Next**.
16. **Would you like to create an Exchange?** Select **Yes** and click **Next**.

    If the customer is exchanging for a different item , select the exchange item from the **SKU** drop-down and click **Add.**

    If the customer is exchanging for the same item, click the **Send Replacements** button.

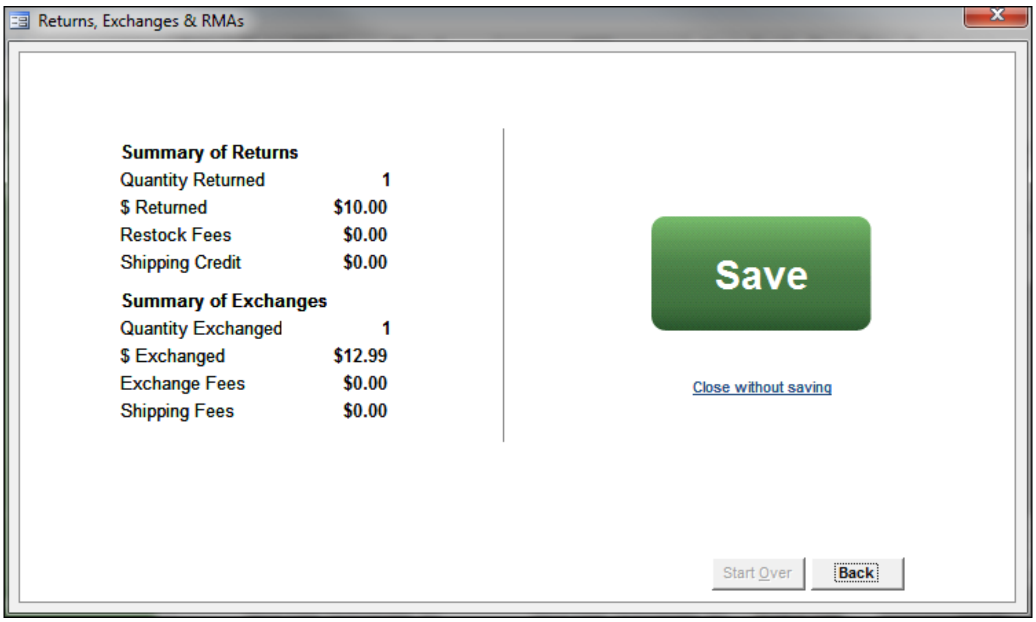
Warning!: *The **Send Replacements** function does not check to see if the returned items are already on the **Exchange Items** list, so be careful not to duplicate entries!*

17. Click **Next** to proceed and add optional fees and credits to the order.
18. If you are not charging any fees, just click **Next,** otherwise check the appropriate box or boxes and enter the additional information each one requires and then click **Next**:
    a. **Apply Restocking Fees for Return** – Available for **Returns** and **Exchanges**.
    b. **Apply Shipping Credit for Return** – Available for **Returns** and **Exchanges**.
    c. **Apply Additional Fees to Exchange** – Only available for **Exchanges**.
    d. **Apply Shipping Fees to Exchange** – Only available for **Exchanges**.

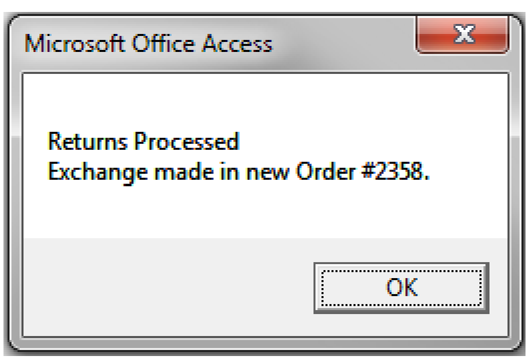


Note: *If processing an exchange, it is possible to specify which order gets the fee or credit – the original order or the new exchange order – by selecting either the* ***In Orig. Order*** *or* ***In New Order*** *options.*

19. For each type of fee or credit selected, choose a calculation method under **Base fees/credits on** and enter a **Value**. Defaults for these fields can be set by using **System Parameters**. See the list of parameters described earlier in this section for their names. Below is a description of the Fee/Credit Basis types:
    - **Flat Amt.** – The **Value** entered represents the dollar amount to charge regardless of the value of the returned item(s).
    - **Per Unit** – The **Value** entered represents the dollar amount to charge for *each unit* returned.
    - **% of Amt.** – The **Value** entered represents a percent of the purchase price of all items returned.
20. Review the details of the exchange and click **Save.**



21. The system displays a message that returns were processed and the exchange was made in a new order. Click **OK**.



22. The system then displays the original order in the **Process Orders** window showing the exchanged items marked as **Returned** (the quantity of items deducted from the order). A Note is added to both orders explaining the action that was taken, referencing the other related order number.
23. Depending on the prices of the original and exchange items, as well as any additional

charges or credits, there may be a balance or credit due:

a. If the system parameter **AllowCarrryForwards** is set to FALSE (system default), the balance or credit due remains with the original order.

b. If the parameter **AllowCarrryForwards** is set to **True**, and there is a balance due from the customer, the program asks whether to carry the balance due onto the new order. If there is a credit due, it is possible to just carry forward enough of the credit to cover the charges for the new order, or the entire credit can be carried forward.

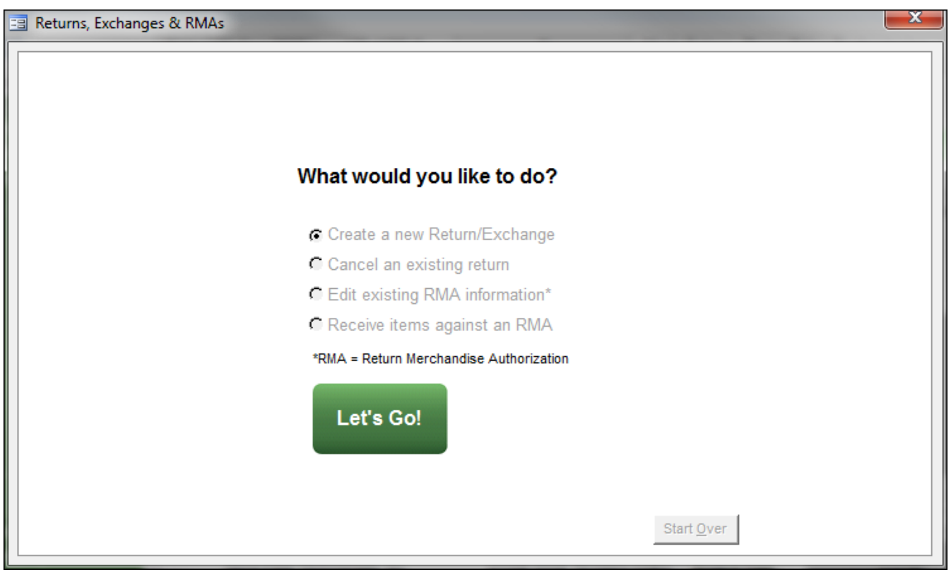
24. To issue credit or receive payment:

- If the original payment was made with a credit card and charged through The Stone Edge Order Manager, go to the **Credit Card Terminal** tab, click **Get data from order**, then click **Transmit** to have the credit card gateway issue the credit or charge the payment due.
- If the original payment was made by check, COD, or credit card outside of The Stone Edge Order Manager, issue a credit to the customer manually (e.g., by sending the customer a check). Once that has been done, go to the **Pricing** tab and click either **Log Credit Issued** or **Payment** button. Fill in the information to inform the program the customer has paid the balance due or received credit due.

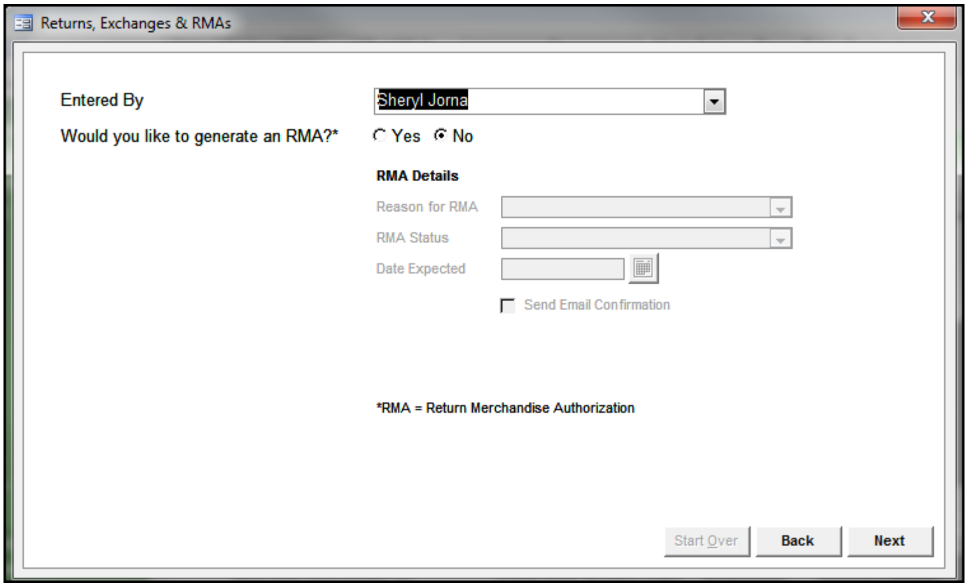
Generating RMAs

If you require an RMA before the customer can return an item, complete the following steps:

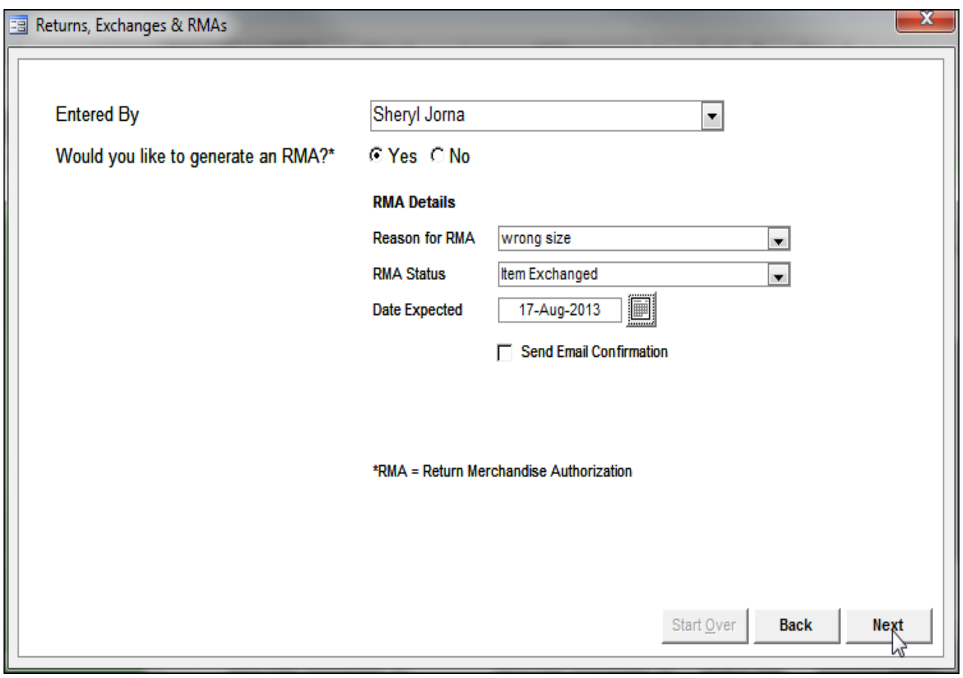
11. Go to **Main Menu > Process My Orders > View & Process My Orders**.
12. Navigate to the correct order by using the scroll arrows at the bottom of the screen or by searching for the order.
13. Select the **Items** tab and click the **Return/Exchange** link in the accordion to open the **Returns, Exchanges and RMAs** wizard.



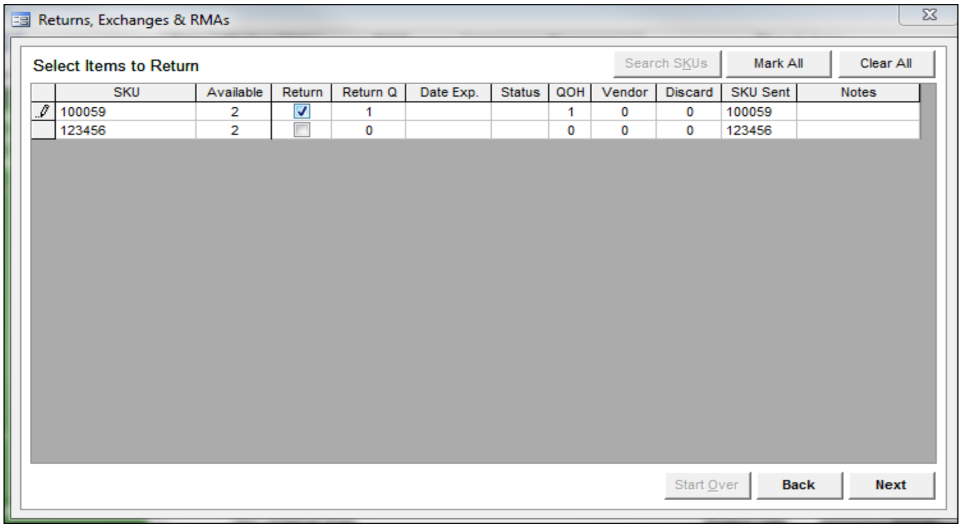
14. Click **Let's Go!** to begin entering data about the return.



15. Select the name of the person processing the return and click **Next.**
16. Select **Yes** to **Would you like to generate an RMA?**
17. **Enter a reason for the RMA,** an **RMA status** and the **Date Expected.**
18. If you want to send the customer an email confirmation, check **Send Email Confirmation**.



19. Click **Next.**

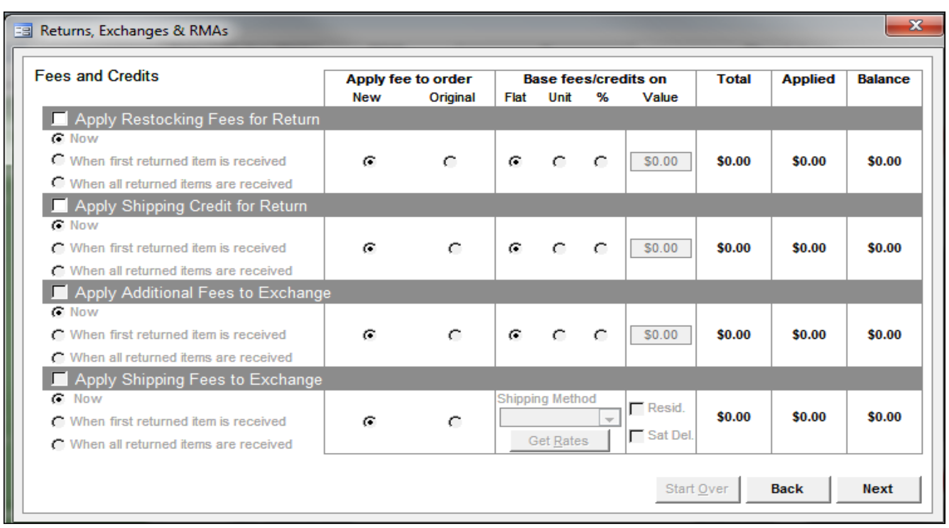


20. Select the **Return** box for any items being returned and also enter the quantity returned in **ReturnQ**. Tell the program how to handle the changes to inventory by altering the values in the **QOH**, **Vendor**, or **Discard** fields. **QOH** refers to Stone Edge inventory, **Vendor** refers to an item returned to a supplier, and **Discard** means that the item cannot be resold and was tossed.

- The sum of the **QOH**, **Vendor** and **Discard** fields *must* equal the number in the **Return Q** for each item.
- If the customer was sent the wrong product, enter the actual SKU that they received in the **SKU Sent** column. The **Search SKUs** button is activated after clicking in the **SKU Sent** column. Click it to open the Search Inventory screen. Enter search criteria to locate the desired SKU.
- Optional: Add any notes specific to each line item in the **Notes** column.

Note: *The system makes QOH and cost-of-goods changes based on this information. It notifies you if the replacement SKU does not have sufficient QOH to fill the exchange request. You are prompted for verification before the system adds the SKU to the exchange item list.*

21. Click N**ext.**



22. Enter any fees that apply to the return or exchange.

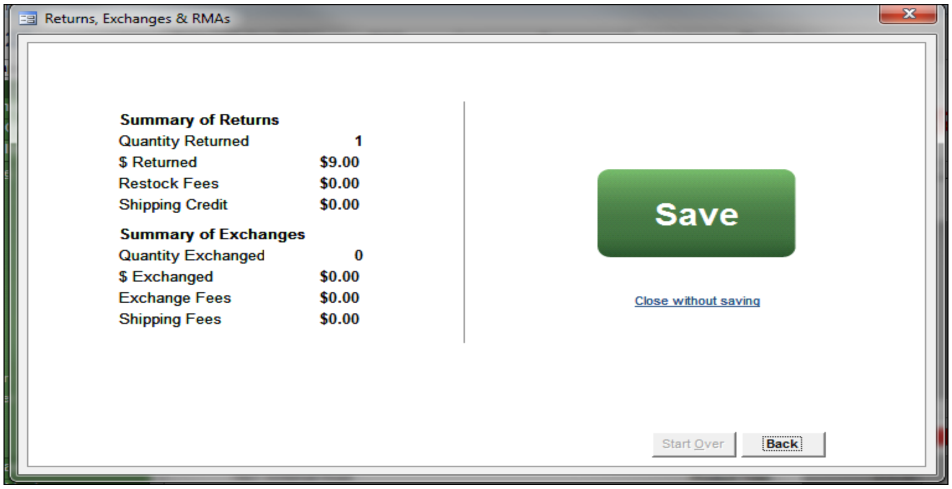
    a. **Apply Restocking Fees for Return** – Available for **Returns** and **Exchanges**.

    b. **Apply Shipping Credit for Return** – Available for **Returns** and **Exchanges**.

For each fee or credit selected, select a calculation method under **Base fees/credits on** and enter a **Value**. (Defaults for these options can be preset in the **System Parameters,** See list of parameters earlier in this section.) Below is a description of the Fee/Credit Basis types:

- i. **Flat Amt.** – The **Value** entered represents the dollar amount to charge regardless of the value of the returned item(s).
- ii. **Per Unit** – The **Value** entered represents the dollar amount to charge for *each unit* returned.
- iii. **% of Amt.** – The **Value** entered represents a percent of the purchase price of all items returned.

23. Click N**ext.**



24. Click **Save**. The system then displays the original order at the **Process Orders** screen with the item marked as **Returned** (the quantity deducted from the order total). A **Note** is added to the order indicating the action taken.

25. Since the returned item was already paid for (which would usually be the case), the **Credit Due** is indicated. To issue the credit:

    a) If the original payment was made with a credit card and charged through The Stone Edge Order Manager, go to the **Payment** tab, click **Get data from order**, and click **Transmit** to have the credit card gateway issue the credit to the customer's card.

    b) If the original payment was made by credit card outside of The Stone Edge Order Manager, or by check or some other offline payment method, the credit must be issued manually (e.g., by sending the customer a check). Once that has been done, go to the **Pricing** tab and click the **Log Credit Issued** button. Fill in the information to record the credit in Stone Edge.

Editing RMAs

1. Locate the order with the RMA to be edited in the Process Orders screen and select the **Items** tab.
2. Click the **Return/Exchange** button. The RMAs, Returns, and Exchanges window opens.
3. Choose the **Edit existing RMA information** radio button and click **Let's Go.**
4. Select the name of the user who is making the changes from the **Edited By** drop-down list.

5. Click **Next** and make any necessary changes to the information, fees, or credits. If the RMA includes an E**xchange** which was already processed, the exchange information cannot be modified, however the fees can.

> ***Note:*** *Keep in mind that if fees were already applied by earlier actions, the system only applies the* ***difference*** *between the amounts originally applied and any new amounts entered here.*

6. Click the **Save** button to save the changes to the RMA.

Depending on the selections chosen, the system may create an exchange order, or it may apply additional fees and credits to the original and/or exchange orders.

Related System Parameters

Use the following system parameters to configure RMA, Return and Exchange options:

AllowDoRMAs	Controls whether the Generate RMA action is available at the Returns, Exchanges and RMAs form.
AllowExchanges	Determines whether the Exchange line item button at the Process Orders form will be available. TRUE = the button will be available.
AllowReturns	Determines whether the Return line item button at the Process Orders form will be available. TRUE = the button will be available.
ApproveExchangeOrders	If TRUE, orders created by the program for exchanged items will be automatically approved.
ChargeRestockForExchanges	If you have the system set up to charge restocking fees for a return (ReturnFeeCalcType not set to "None" AND ReturnFeeCalcValue is greater than zero), do you want the fees charged if the customer is performing an exchange? Default=Yes
DefaultReturnsToDiscard	Set to True to have the system mark returned items as discarded rather than as returned to inventory or vendor.
DropShipReturnsToInventory	If True, a drop-ship item will default to being returned to your in-house quantity on hand rather than being returned to the vendor. Default=False
ExchangeDefaultShippingMethod	The default shipping method to set on an exchange order.
ExchangeFeeCalcType	NONE – the system will not calculate a fee for an exchange. FLAT – the system will charge the amount entered into the ExchangeFeeCalcValue parameter for the exchange order. PER ITEM – the system will multiply the amount in the ExchangeFeeCalcValue to the number of units being exchanged. PERCENT – the system will apply the percentage value entered into the ExchangeFeeCalcValue parameter to the total retail value of the exchange items.
ExchangeFeeCalcValue	Based on the value selected for ExchangeFeeCalcType parameter, enter the dollar amount or percentage to use when calculating fees for exchanges.

ExchangeShippingFeeAmount	Flat dollar amount to charge for shipping exchange orders.
GenerateRMAsDefault	Set to True to automatically create an RMA when performing a return or exchange.
OutstandingRMATemplate	Name of the report to use for printing Outstanding RMA list.
ReturnFeeCalcType	NONE – the system will not calculate a fee for a return. FLAT – the system will charge the amount entered into the ReturnFeeCalcValue parameter for each return action (one or more items can be returned during a single return action). PER ITEM – the system will multiply the amount in the ReturnFeeCalcValue by the number of units returned. PERCENT – the system will apply the percentage value entered into the ReturnFeeCalcValue parameter to the total retail value of the returned items.
ReturnFeeCalcValue	Based on the value selected for ReturnFeeCalcType parameter, enter the dollar amount or percentage to use when calculating fees for returns.
ReturnsAndExchangesTemplate	Name of report to print as "Returns and Exchanges".
RMAAllowNewReasons	If FALSE, reasons for RMAs will have to be selected from a pre-defined list (entered at the List Maintenance form); if TRUE, users can select from the list or enter new reasons.
RMACreatedDefaultEmail	If a template name is entered here, that will be the default email template selected when a new RMA is issued.
RMAIssuedStatus	If text is entered here, that text will be inserted into the Status field in the Order Details table when an RMA is issued for an item. Any text already present in the Status field will be lost. If nothing is entered here, the Status field will not be affected. Note that this status will be set even if the RMA does not apply to the total quantity of the line item.
RMAReceivedDefaultEmail	If a template name is entered here, that will be the default email template selected when anything is received against an RMA.
RMAReceivedStatus	If text is entered here, that text will be inserted into the Status field in the Order Details table when the total authorized return quantity of an RMA has been received. Any text already present in the Status field will be lost. If nothing is entered here, the Status field will not be affected. Note that this status will be set even if the RMA does not apply to the total quantity of the line item.
RMAsAutoEditOnOpen	If set to True and an RMA already exists on an order when opening the Returns, Exchanges & RMAs button at Process Orders, the system will automatically select an RMA to edit. The RMAsAutoReceiveOnOpen

	parameter takes priority over this parameter.
RMAsAutoReceiveOnOpen	If set to True and an RMA already exists on an order when opening the Returns, Exchanges & RMAs button at Process Orders, the system will automatically select an RMA to receive. This parameter takes priority over the RMAsAutoEditOnOpen parameter.
RMASetToCurrentUser	If user security is on or a default user is specified, this parameter controls whether or not the system automatically sets the user when the RMA form opens.
ShippingCreditCalcType	NONE – the system will not calculate a shipping credit for returns. FLAT – the system will charge the amount entered into the ReturnShippingCreditCalcValue parameter for each return action (one or more items can be returned in a single return action). If the ReturnShippingCreditCalcValue is set to zero, the system will use the remaining shipping amount on the original order. PER ITEM – the system will multiply the amount in the ReturnShippingCreditCalcValue to the number of units being returned. PERCENT – the system will apply the percentage value entered into the ReturnShippingCreditCalcValue parameter to the remaining shipping amount on the original order.
ShippingCreditCalcValue	Based on the value selected for ReturnShippingCreditCalcType parameter, enter the dollar amount or percentage to use when calculating shipping credits for returns.
ShippingCreditForReturns	Determines the default setting as to whether or not a shipping credit should be issued for returns and exchanges
WarnIfDiscountsOnReturns	When the Returns & Exchanges link is clicked at Process Orders, warn if the current order has any coupons or discounts.

Additional Order Information

When viewing an order, there are a number of tabs along the side of the **Process Orders** window display specific types of data associated with the order. Click on a tab to see that information.

The tabs are:

Snapshot Tab

Order Tab

Items Tab

Payment Tab

Shipping Tab

Customer Tab

Notes Tab

Custom Tab

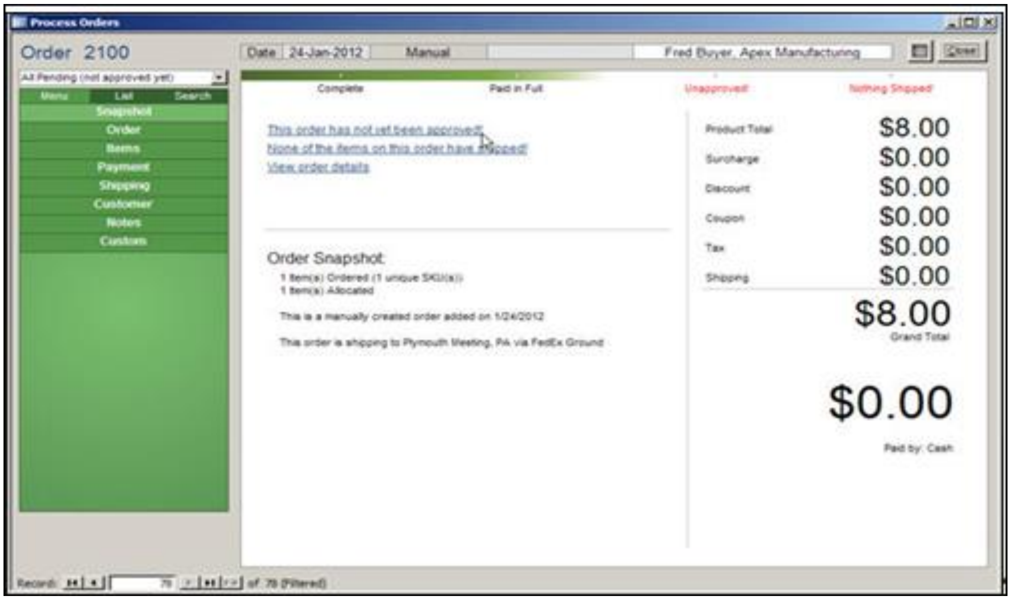
Warning Tab

Process Tab

Note: *The last three tabs are only visible under certain conditions.*

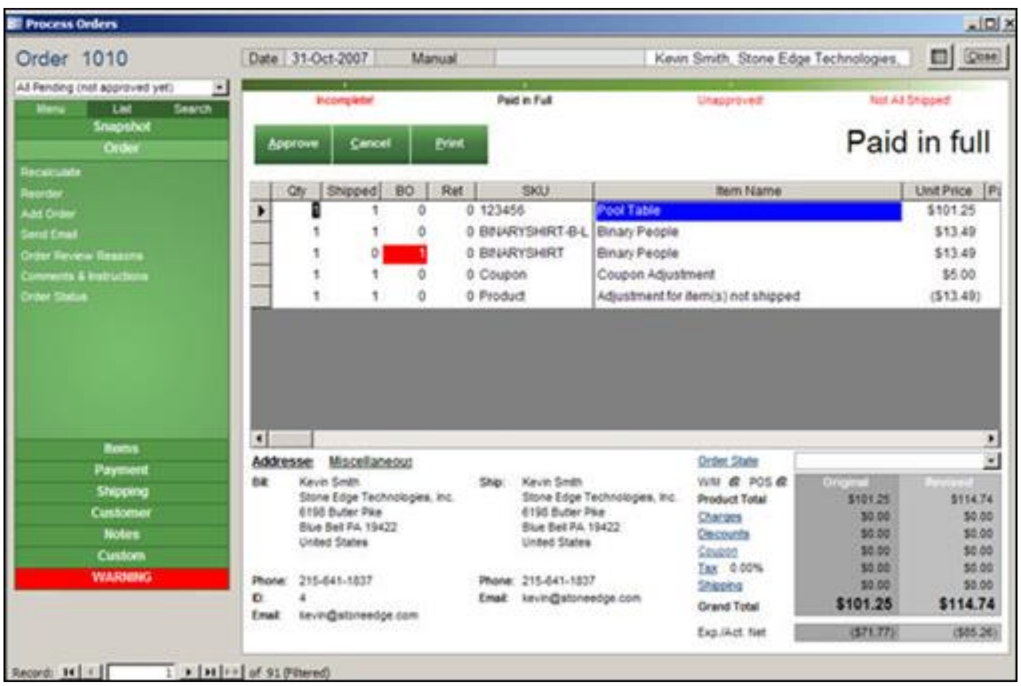
Snapshot Tab

The **Snapshot** tab of the **Process Orders** screen gives a high level view of an order. You can easily see which stages of processing are complete by looking at the progress bar at the top of the screen. There are links which take you directly to the location where you can satisfy any unfinished phases of processing.



Order Tab

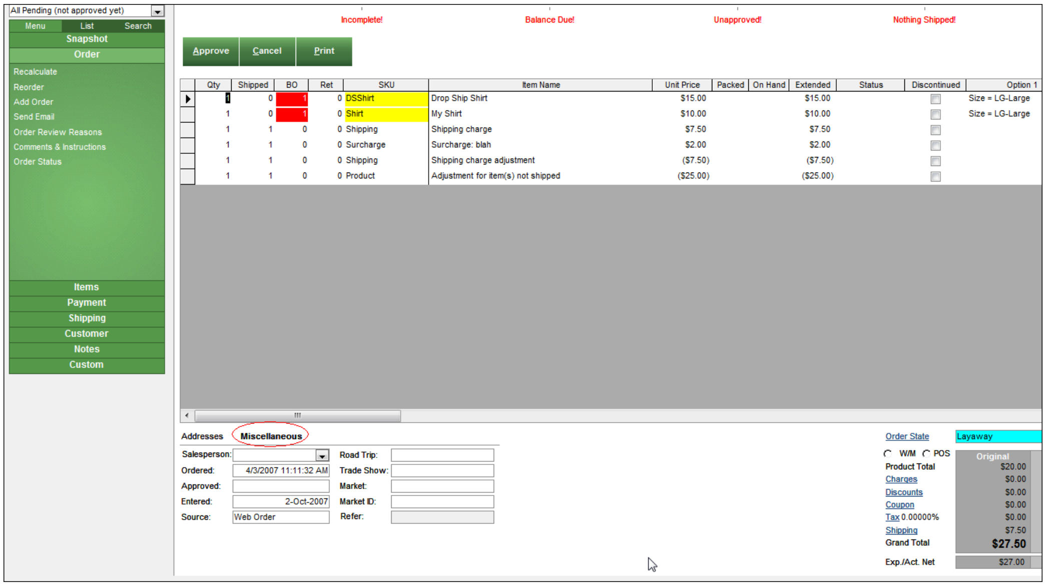
The **Order** tab of the **Process Orders** screen displays the order level information as well as line item details. You can **Approve**, **Cancel** or **Print** the paperwork for an order, as well as change its **Order State, Charges, Discounts, Coupons,** or **Shipping** amounts. **Tax** cannot be altered once it is committed at Avalara (if you are using Avatax).



Addresses Tab

- contains the billing, shipping, and contact information for the order, see the image above

Miscellaneous Tab



- contains additional order information, such as the salesperson who places or gets credit for the order, the date the order is placed, the date the order is entered into Stone Edge, the date the order is approved, and the source of the order (POS, Manual Orders, shopping cart)
- if the order is received through a Road Trip or Trade Show, the name of the trip or show is also displayed
- if the order is received from a web marketplace, such as Amazon or eBay, the name of the marketplace and the order ID from the marketplace are displayed
- a referral sources may also be displayed here

Recalculate

- recalculates the order total after changes are made

Reorder

- duplicates the order items in a new order for the current customer

Add Order

- create a new order for any customer at Manual Orders

Send Email

- send an email to the current customer

Order Review Reasons

- view reasons the order is not automatically approved on import
- you can also add a reason to alert other users to check something before the order is approved and shipped
- you can also remove a reason when it is resolved to indicate it is ok to ship the order
- if there are reasons the order is not automatically approved, the **WARNING** tab is visible

Comments & Instructions

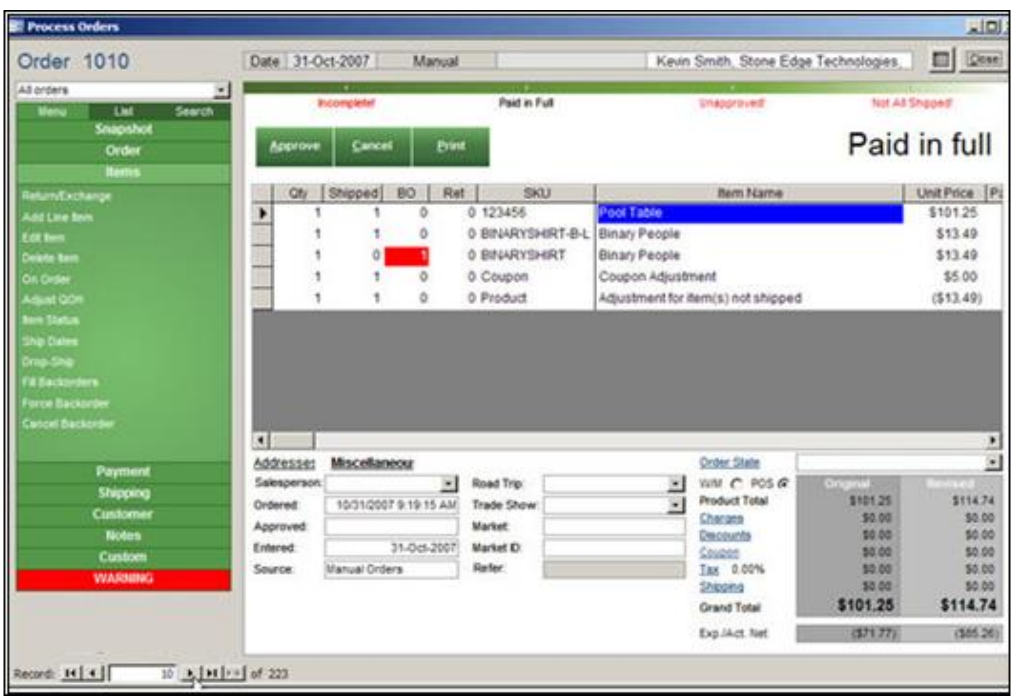
- contains the billing and shipping information of the current order
- displays the MaxMind fraud score (requires a separate subscription with MaxMind)
- any comments or instructions related to the order are displayed here
- you can also add a note that is printed on the sales receipt (invoice)
- if there are reasons the order is not automatically approved, the **WARNING** tab is visible
- if there are any comments or instructions the **WARNING** tab is visible

Order Status

- contains the billing, shipping, and contact information for the order

Items Tab

The **Items** tab of the **Process Orders** screen is basically the same as the **Order** tab, with the exception of the links in the accordion that perform functions against a selected item.



Return/Exchange

- opens the Returns, Exchanges and RMAs wizard

Add Line Item

- click this link to add a line item to the current order

Edit Line Item

- allows you to update values in some fields of the selected line item

Delete Item

- removes the selected line item from the order

On Order

- shows the number of units of the current line item on order at PO Expected Dates screen

Adjust QOH

- opens the *Adjust Inventory* screen where you can manually adjust the QOH of the current line item

Item Status

- view or set the status update label of the current item or all items in the order

Ship Dates

- view, set, or clear the actual or expected ship dates for the current item or all items in the order

Drop-Ship

- create, update or cancel drop-ship purchase orders (before they are sent)
- send an email to the supplier of a selected item
- add tracking information for drop-shipped items

Fill Backorders

- when an out-of-stock item is replenished, click this link to fill the quantity required for the current order

Force Backorders

- select a line item and click this link to force the program to order it from the supplier rather than filling it from their stock

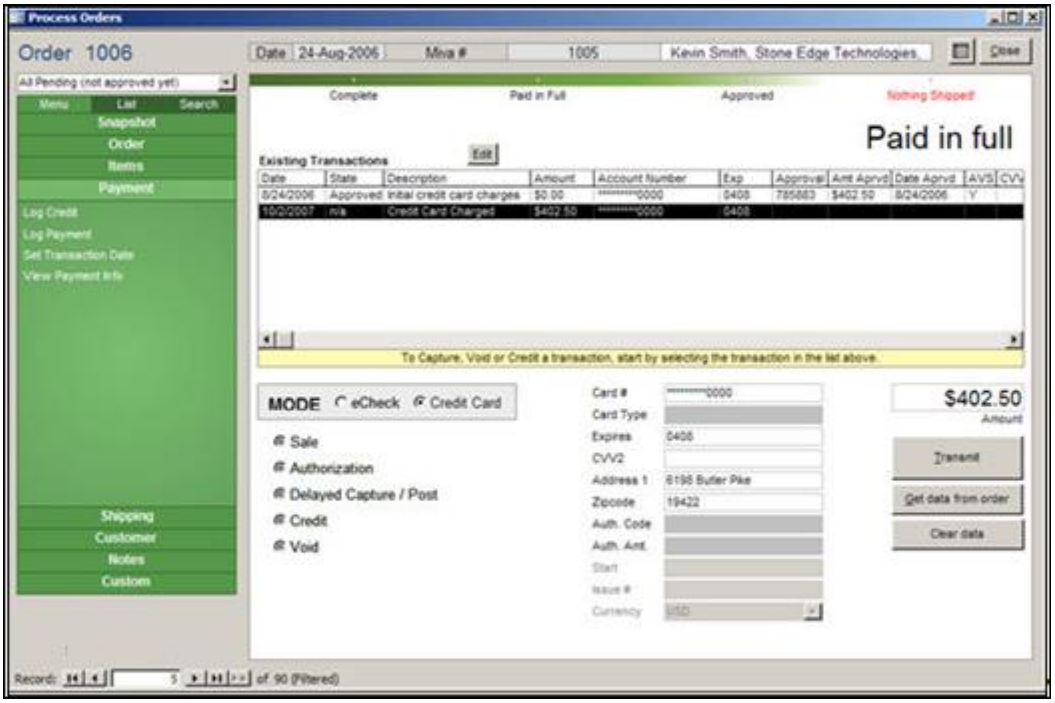
Cancel Backorders

- select the backordered item and select this link to cancel the request to order it from the supplier (if the purchase order has already been sent to the supplier you must cancel the purchase order from the *Purchase Orders* screen)

Payment Tab

The **Payment** tab of the **Process Orders** screen is where you view or process electronic payment transactions. You can also record other payment types, such as checks, purchase orders or COD.

The Payment Terminal on the right side of the screen is only visible when a credit card processor is configured.



Log Credit

- manually record a credit owed or paid to a customer which was not processed electronically through Stone Edge (offline payment method)

Log Payment

- manually record a payment which was not processed electronically through Stone Edge

Set Transaction Date

- select a transaction in the Payment Terminal and click this link to manually record a transaction date

View Payment Info

- open the *Pay Data for Order #* screen which shows information about the manner in which the order was paid, including the Payment Method, customer account information, payment gateway approval information, PO # or payment Terms

View Previous Transactions

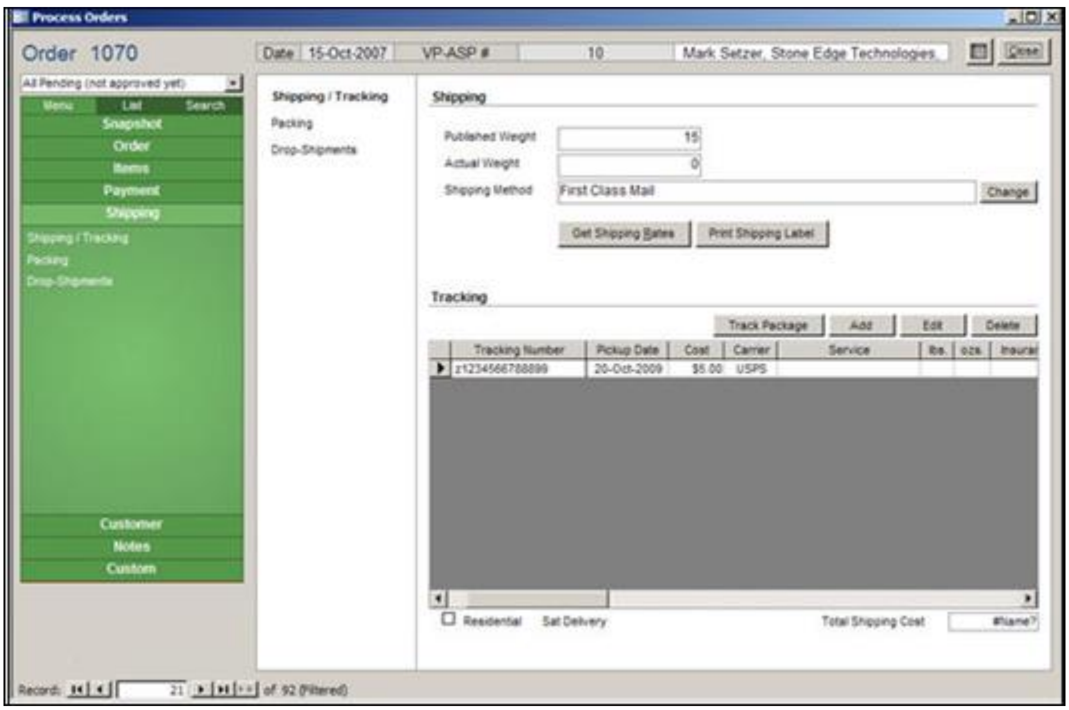
- opens the *Previous Transactions* screen where a list of transactions for the current order is displayed
- if a payment gateway is not currently configured, use this link to view payment information

Shipping Tab

The **Shipping** tab of the **Process Orders** screen is where shipping, packing and drop-ship information for the current order is displayed.

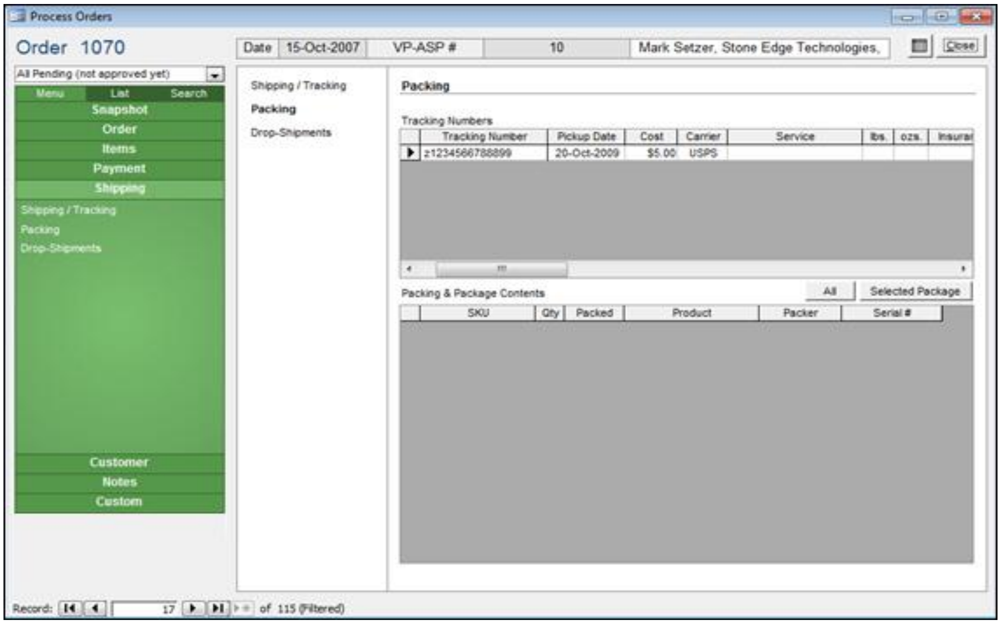
Shipping/Tracking

Select **Shipping/Tracking** to see the Published or Actual weight of the entire order, change the shipping method, check shipping rates and print shipping labels from an integrated shipping solutions. Tracking information can also be entered, updated, or deleted here.



Packing

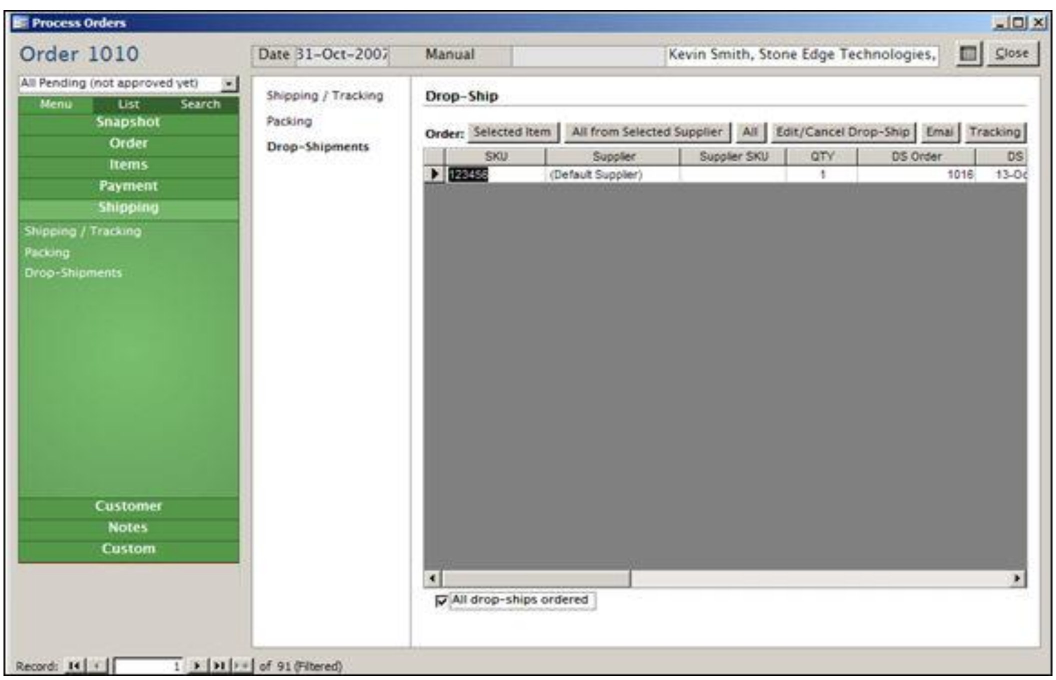
The **Packing tab** displays information about each item in the order that is packed by the **Pack & Ship** screen.



Packing records are also created when with **Drop Ship Tracking** data is imported. To see the packing data for a specific tracking number, click the tracking record and click **Selected Package**. Use the **All** button to view packing data for all tracking numbers associated with the current order.

Drop Shipping Tab

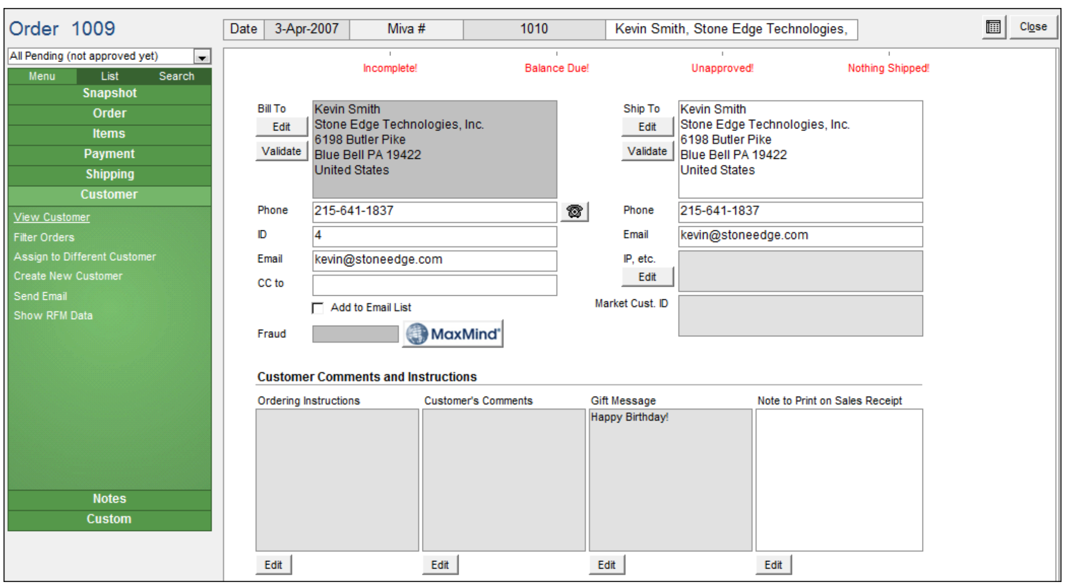
Drop-shipped items are products shipped directly from a vendor ships to the merchant's customers, rather than from the merchant's own stock. Use the **Drop-Shipments** tab to view and process drop-ship purchase orders for drop-ship items.



- You can process a single drop-ship item by selecting it from the list and clicking **Selected Item**. The program acts in accordance with the method configured on the supplier's record. For instance, if the primary supplier for the item is configured to receive purchase orders via email, the *Send Email* screen opens with the appropriate template selected.
- To create a drop-ship purchase order for all of the drop-ship items that have the same primary supplier as the selected item, click **All from Selected Supplier**.
- To place drop-ship purchase orders for every drop-shipped item currently on order, click the **All** button.
- Drop-shipped items are normally ordered from their **Primary Supplier**. To select a different supplier for the current order only, or to cancel the drop-shipping for a single item, click the **Edit/Cancel Drop-Ship** button.
- To send an email message to the primary supplier about a specific item, select it and click the **Email** button.
- To enter or import tracking data for the drop-shipped items, click the **Tracking** button.

Customer Tab

The **Customer** tab of the **Process Orders** screen displays the customer's billing and shipping information, comments and instructions, and MaxMind fraud scores (requires a subscription for MaxMind services).



Perform the following functions on this screen:

- Click the **Edit** button next to the Bill To or Ship To addresses to change address information.
- Click the **Validate** button to validate the **Bill To** or **Ship To** addresses. The program accesses the Endicia servers to verify the address through the USPS.
- To place a telephone call to the customer, click in the **Phone** field and select the button with the telephone icon. Requires some Windows configuration to dial the phone.
- To change the customer's IP address, click the **Edit** button next to the field. If your shopping cart does not provide IP addresses for customer, this field can be used to store other data.
- You can make changes to the comments, gift messages or instructions by selecting the **Edit** button below the appropriate field.

- **Ordering Instructions** are usually imported with an order and include things like "leave package on back porch" or "please wrap each item separately".
- **Comments** are similar to Ordering Instructions. For example "I recall meeting you at last year's conference".
- **Gift Messages** are usually printed on packing slips.
- **Note to Print on Sales Receipt** allows you to add a note on the sales receipt.

View Customer

- opens the *Customer* screen to the current customer's record

Filter Orders

- limits the current record set to orders from the current customer

Assign to Different Customer

- change the customer record associated with the current order

Create New Customer

- opens the *Customer* screen

Send Email

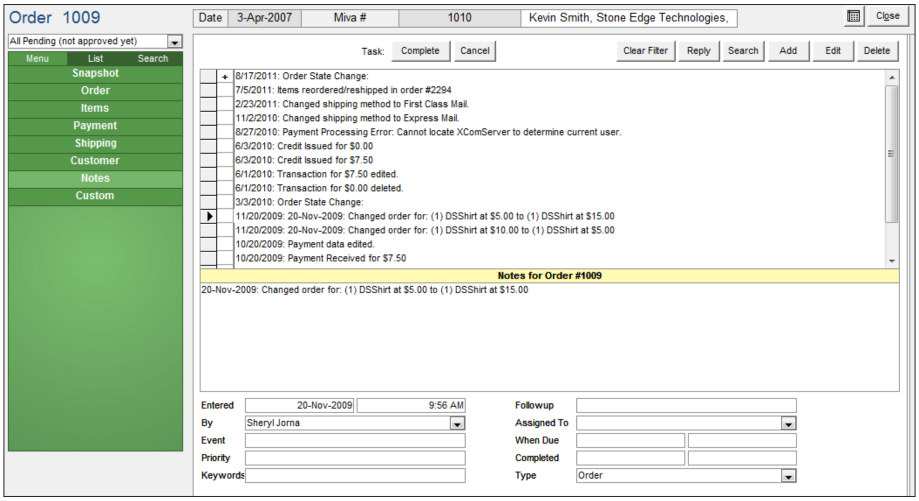
- compose and send an email message to the current customer

Show RFM Data

- opens another screen which displays more detail about the customer's previous purchases

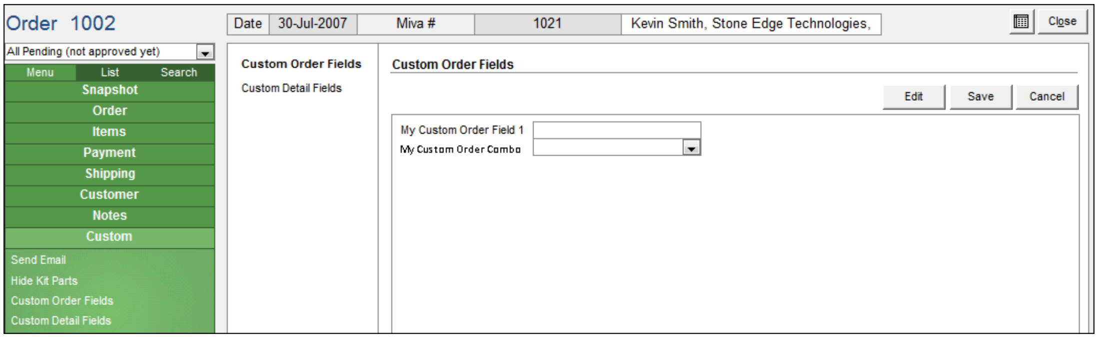
Notes Tab

The **Notes** tab of the **Process Orders** screen displays any notes or tasks associated with the current order. Refer to ***Checking Notes and Tasks***, in Chapter 2, for more information.



Custom Tab

The **Custom** tab of the **Process Orders** screen only displays custom order and order detail fields if they have been defined in Stone Edge. Refer to ***Defining Custom Fields***, in Chapter 2, for more information about these fields and how to create custom order fields.



- Click the **Edit** button to make changes to the data in a custom field.
- To keep the changes, click the **Save** button.
- To un-do the changes and return to the previously stored data, click the **Cancel** button.

Send Email

- compose and send an email message to the current customer

Hide/Show Kit Parts

- toggles the view to show or hide line item details for kits and their parts

Custom Order Fields

- displays any custom order fields you have defined in Stone Edge

Custom Detail Fields

- displays any custom order details fields you have defined in Stone Edge

WARNING Tab

The **WARNING** tab of the **Process Orders** screen has a bright red background and is only visible when there are reasons for manually reviewing the order before processing it.

Some review reasons are set when an order is imported, but you can create your own reasons and apply them to a given order.

Some possible reasons include: comments or special instructions in the order, an unrecognized payment method, if the entire order is backordered, the order includes drop-ship items, sales tax was added by the program, etc..

Process Tab

The Process tab appears when there are tracking numbers to process. After it is run, the tab disappears until the next time there are tracking numbers to process.

Importing Orders

Orders can be imported into The Stone Edge Order Manager from the Internet or from a text file. The method used depends on the shopping cart's capabilities. If a supported shopping cart does not allow orders to be imported directly from the Internet, they can be imported from a text file. Before orders can be imported from a text file, however, the shopping cart must be able to export the order information in a file of the proper format and then that file must be placed in the **NewOrders** directory, check parameter **NewOrderLocation** to determine its location.

Note: *See your shopping cart's instructions for information about exporting orders to a text file. For more information about a specific cart's capabilities, see the* ***Shopping Cart Matrix*** *in the online* ***Knowledge Base.***

Complete the following steps to import orders from either the Internet or a text file:

1. Go to **Main Menu > Import My Orders > Import My New Orders**.
2. **Select Shopping Cart** lists all of the shopping cart systems for which you have a license. Select the shopping cart from which you wish to import orders and click the **Import via Internet** or **Import from Text File** button, depending on the type of import to be performed.

   Note: *The shopping cart must be defined within The Stone Edge Order Manager before orders can be imported.*

3. Click **OK** to acknowledge the completion of the process. If parameter **UsePrinterMenu** is set to TRUE, you are prompted with the option of printing an order summary and pick list. Be advised that use **UsePrinterMenu** is a global parameter affecting all workstations.
4. Click the **View these orders** to see the orders from the last import at the Process Orders screen.

Manual Orders

In addition to importing orders from a website (shopping cart), The Stone Edge Order Manager can also be used to manually enter orders that are received via mail, telephone, fax, or email.

The steps involved in entering orders manually, include:

Accessing the Manual Entry Window

Entering Customer Information

Entering Items

Entering Messages and Notes

Entering Custom Order Fields (Optional)

Entering Payment Information

Saving a Manually Entered Order

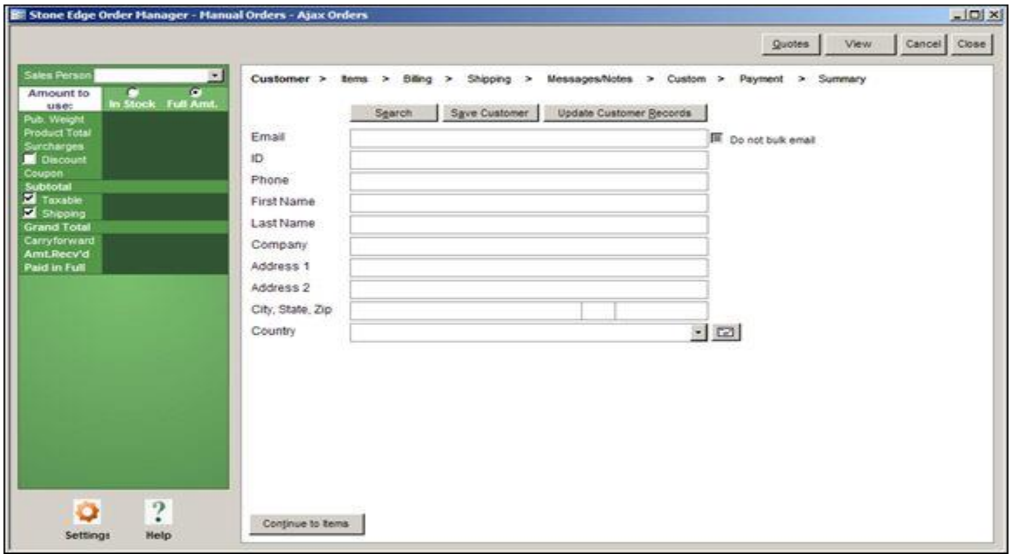
How to Place a Manual Order

There are several ways to access the **Manual Orders** screen.

- Set the **Create a New Order** shortcut button to **Manual Orders**.
- **Main Menu > Create a New Order > For a New Customer**

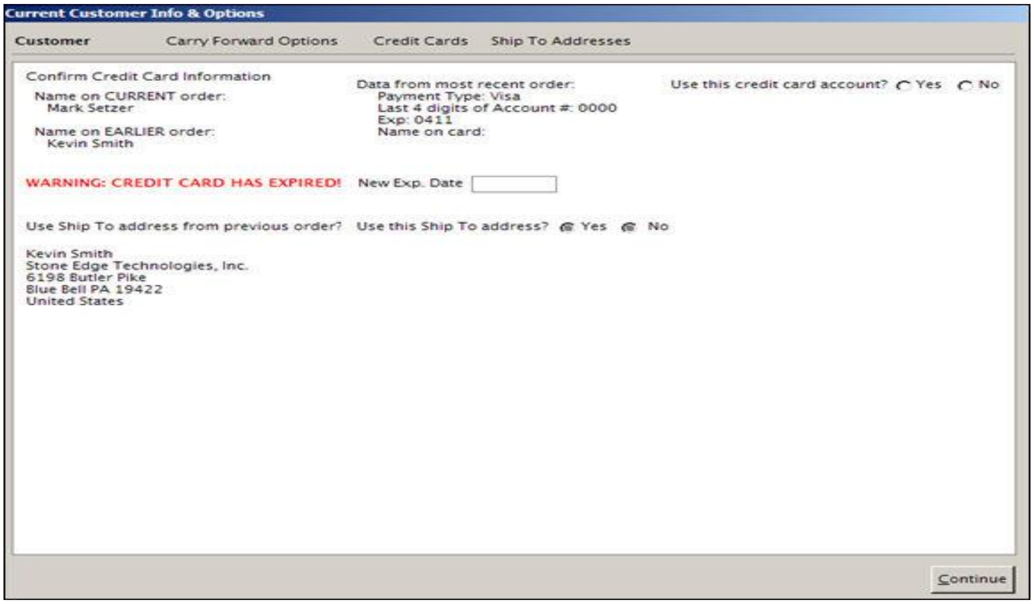
- **Main Menu > Create a New Order > For an Existing Customer**
- **Main Menu > Process Orders > View and Process My Orders > Order tab > Add Order link**
- **Main Menu > Manage My Customers > View and Manage My Customers > Customer tab > Create a New Order link**.

The **Manual Orders** wizard leads you through the process of creating the order. The only difference between choosing to create an order for a new customer or an existing customer is that the *Search for Customer* screen is opened when the latter is selected. The program inserts the customer information in the Customer screen for you.



1. Optional: Select the **Sales Person** who is entering the order from the drop-down list. The Stone Edge Order Manager provides a report of sales by sales personnel based on this field. Refer to the **List Maintenance** section of Chapter Two for instructions to populate the Salesperson drop-down list. Also see parameter **ManualOrdersRequireSalesPerson**.

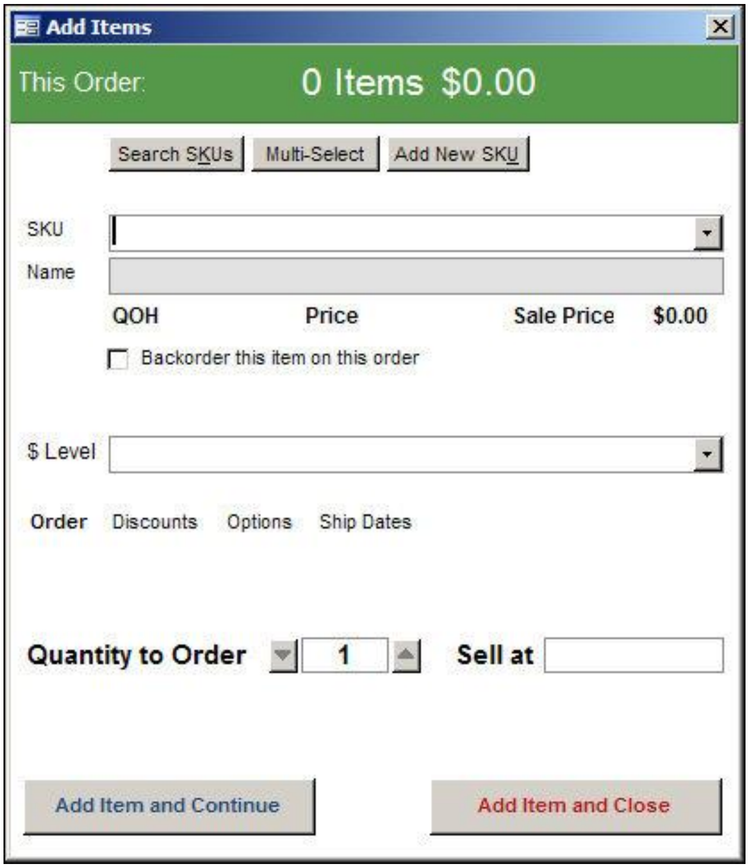
2. If the order is for a new customer, enter the customer's contact information here. The program automatically assigns the value in the **ID** field, and the **Company Name** field is optional. If you are at this screen and know the existing customer's **Email** address, customer **ID**, or **Phone** number, enter one of them, press **Tab** or **Enter** and the program fills in their contact information for you. If the program finds multiple possible matches, it displays the list of matching records from which the appropriate selection can be made. When a customer record is selected, the displays the **Current Customer Info & Options** screen



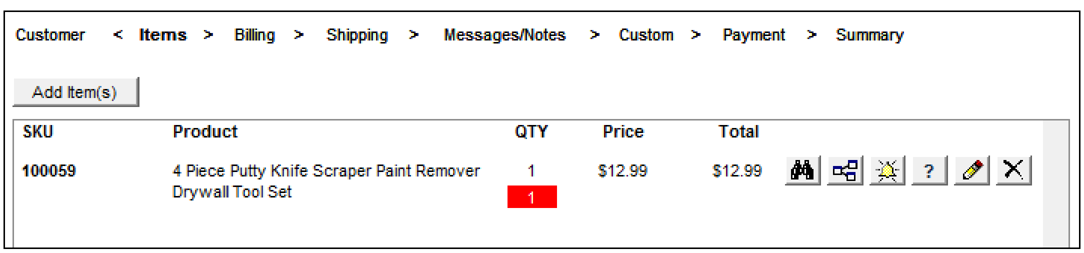
3. Verify the information displayed at this screen and respond **Yes** or **No** to confirm the use of the credit card and/or shipping information from the customer's most recent order.

   If multiple sets of credit card account and/or shipping addresses are found for a given customer, you can make a selection from the **Credit Cards** and **Ship To Addresses** tabs which become visible.

4. Click **Continue** to get back to the Manual Orders Customer screen**.**
5. Then click to **Continue to Items** or the **Items** link at the top of the screen to add products to the order.
6. Click **Add** Items.

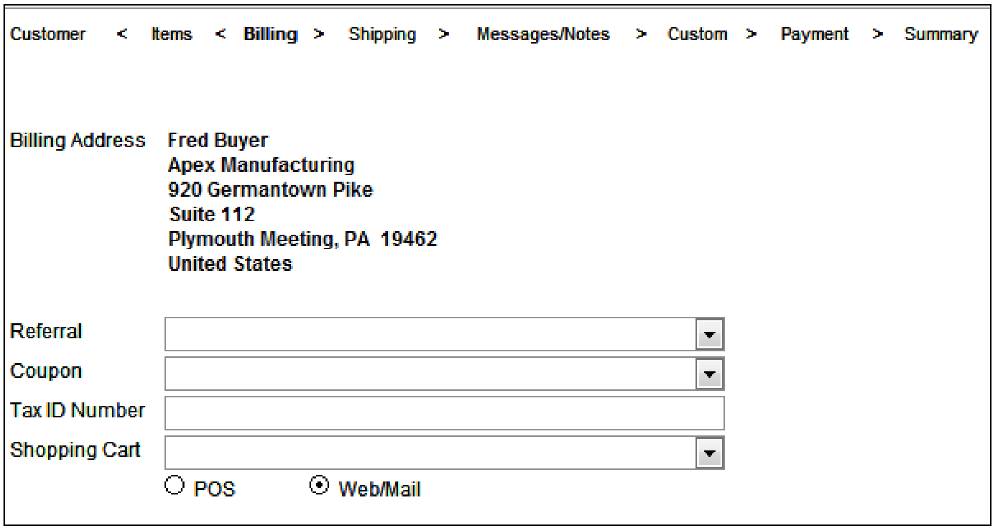


7. Select a **SKU** from the drop-down list, enter the **Quantity to Order**, click **Add Item and Continue** if you have more items to add the order, *or* click **Add Item and Close** if there is only one line item or you are done entering line items. Notice there are other tabs where you can view or make additional selections (**Discounts, Options, Ship Dates**)
8. Back at the **Items** tab of the Manual Orders wizard, you now see the line item or items listed. There are icons to the right that perform specific functions against the selected line item.

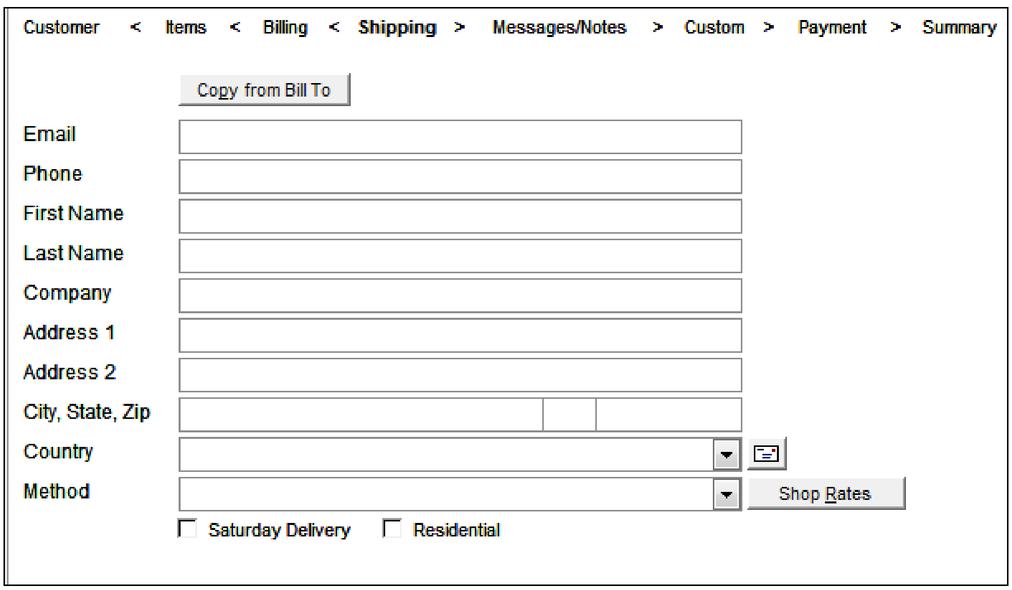


For example, the icon lets you change the item quantity, and the removes the line item from the list. opens the product's Inventory record and displays any messages assigned to the product. Cross-sell items are displayed, as well as open purchase orders for the item.

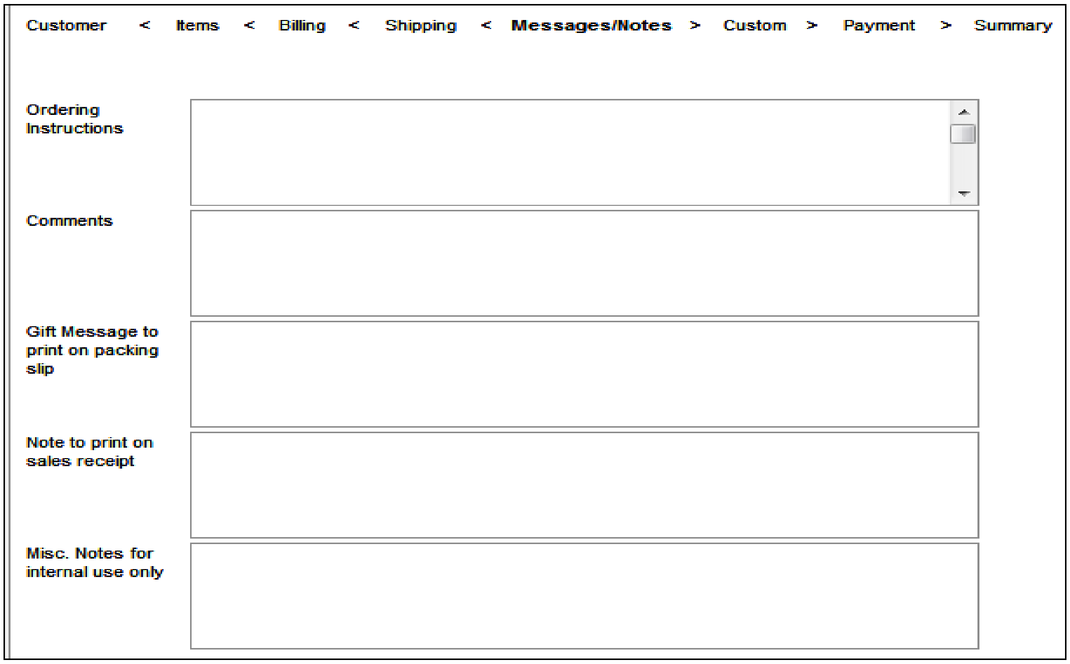
9. Click **Continue to Billing** or select **Billing** at the top of the screen. You can add **Referral, Coupon, Tax ID Number,** or associate the order with a **Shopping Cart.**



10. Click **Continue to Shipping** or select **Shipping** at the top of the screen. Enter shipping information or click **Copy from Bill To** if the order is being shipped to that location. You can also validate the shipping address, and select a shipping **Method** or **Shop Rates.**

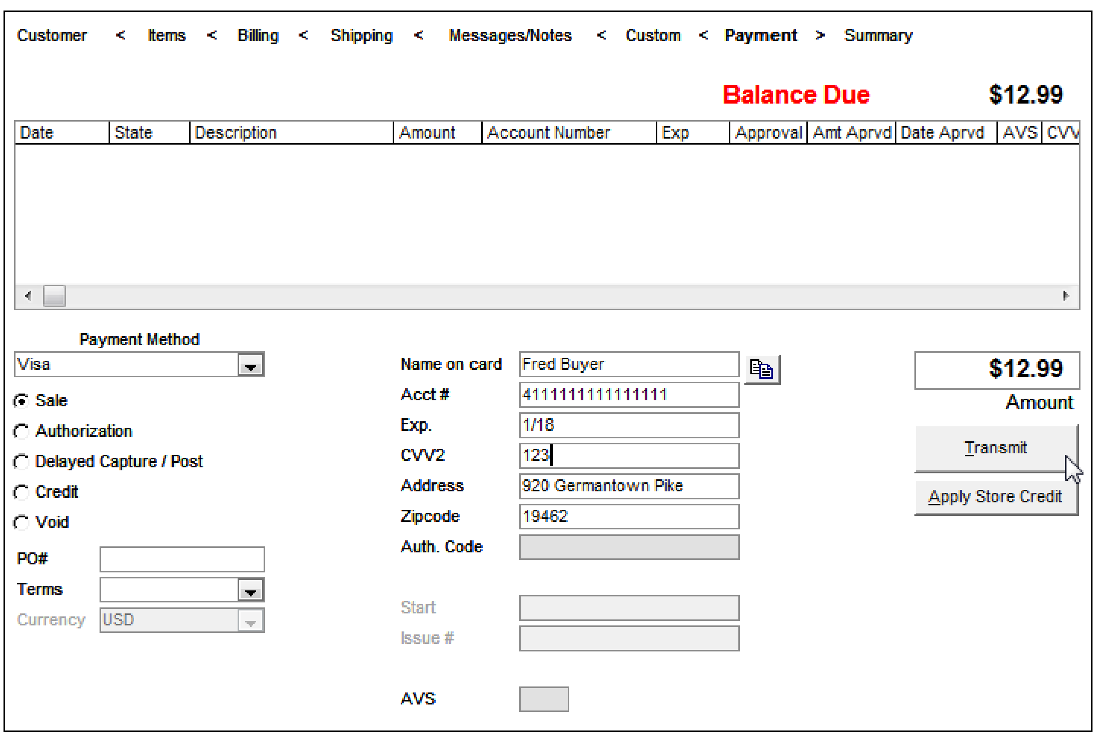


11. Click **Continue to Messages/Notes** or select **Messages/Notes** at the top of the screen. Enter and special **Ordering Instructions**, **Comments**, **Gift Messages**, or **Notes** to print on the customer's receipt.



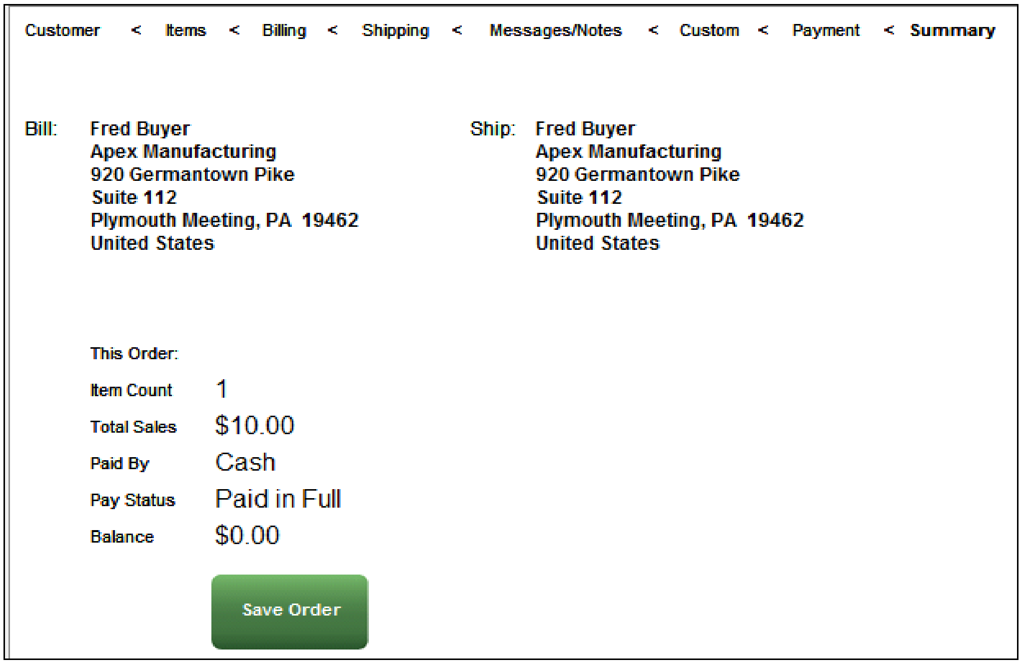
12. If you have customer order fields defined, click **Continue to Custom** or select **Custom** at the top of the screen. Enter values in your custom fields.

13. Select **Continue to Payment** or **Payment** at the top of the screen to enter payment information. The image below assumes you have a credit card gateway configured and can process online transactions. If not select **Check** or another offline payment method to record the payment.



14. Click **Continue to Summary** or select **Summary** at the top of the screen.

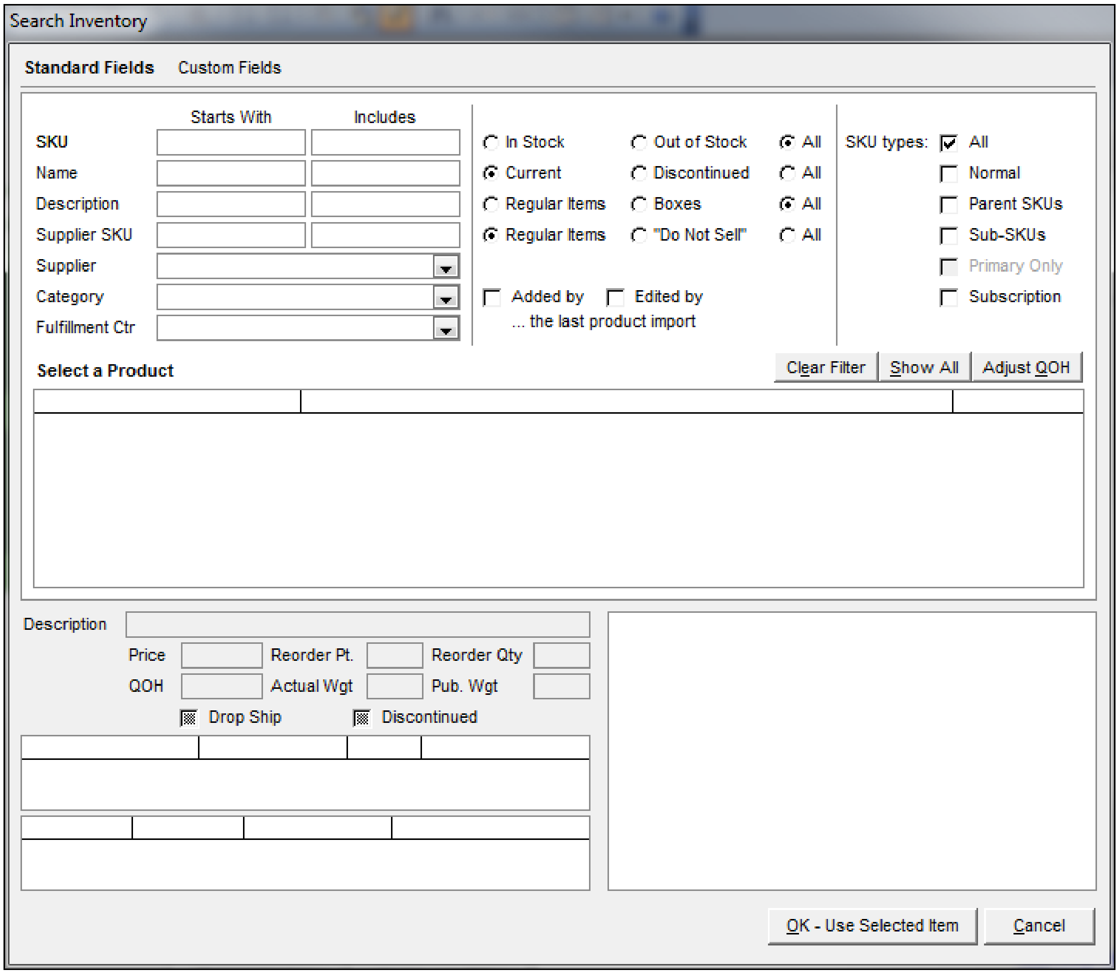
15. Review the order details and click **Save Order.**



16. The program reports the order number. Depending on parameter settings (**ApproveManualOrders**), you may also be asked to approve the order at this time. Make your selections on the *Approval Options* screen and choose **Do Not Print, Print Now or Print Later.** The latter adds the order paperwork to the batch print queue. To view the order you just placed, click the **View Orders** button.

Searching for a SKU to add to an order

When entering a manual order, it is possible to search the inventory for the product by clicking the **Search SKUs** button on the **Add Items** screen. The system displays the **Search Inventory** window:

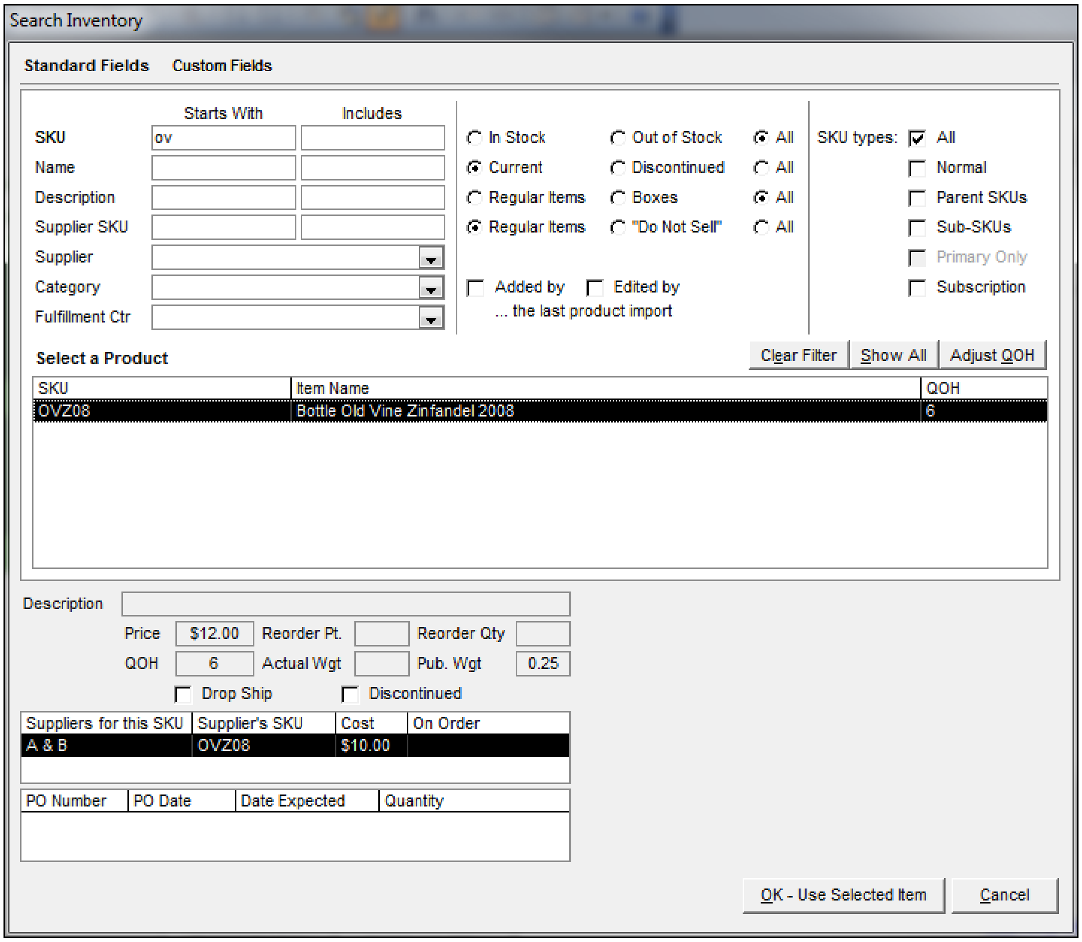


This window is divided into several sections

- the **Standard Fields** tab is where you enter search criteria. If any custom inventory fields exist, a separate **Custom Fields** tab is visible and you can also use those fields as search criteria.
- the **Select a Product** section in the middle of the screen displays the products which match the search criteria.
- the lower portion of the screen contains the product details of the item currently selected in the **Select a Product** area. If product images are used, they are also displayed. For information about adding product images, refer to Chapter 3, *Managing Inventory*.

- Follow these steps to use this form:

    1. Enter search criteria into the fields in the **Standard Fields** tab and press the **Enter** or **Tab** buttons. Selecting radio buttons or check boxes further limits the product search results. The system displays products which match the specified criteria in the **Select a Product** section.



    2. Select a product by clicking its row. The system displays information about that product at the bottom of the screen. If necessary, click the **Adjust QOH** button to manually adjust the quantity on hand for the selected product.

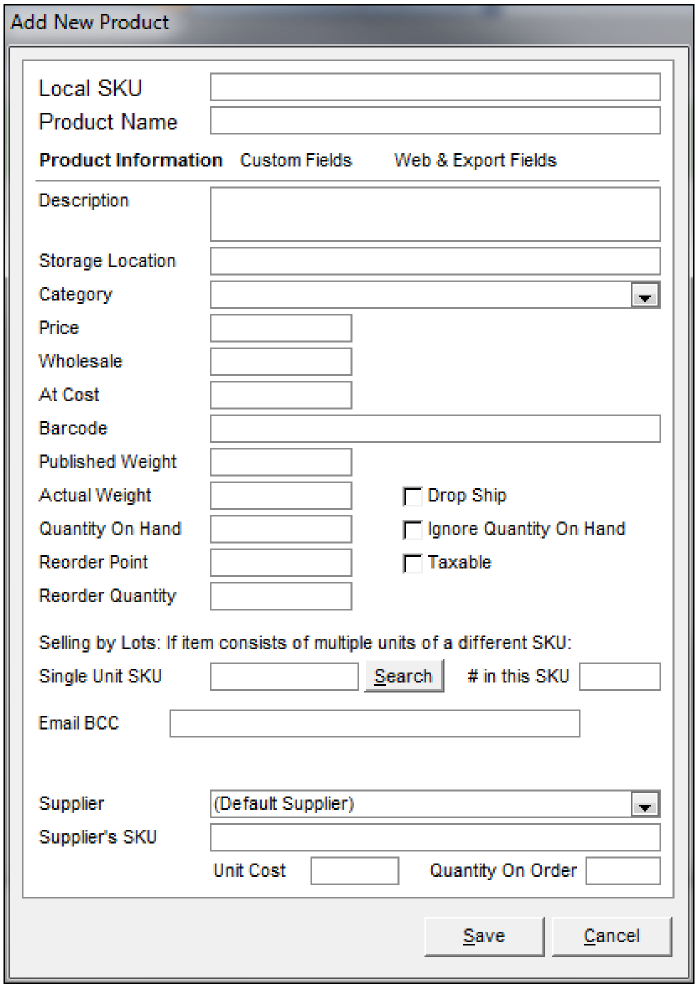
    3. To clear the results list in **Select a Product**, click the **Clear Filter** button and begin a new product search. *Or*, to view all inventory items, click the **Show All** button.

    4. When the proper product is located and selected, click the **OK – Use Selected Item** button. The program puts the SKU, Name and Price information for that product in the **Add Items** form.

    5. Click the **Add Item and Close** button.

Adding a New SKU

When entering line items on a manual order, it is possible to add a completely new product to the store's inventory by clicking the **Add New SKU** button on the **Add Items** screen.

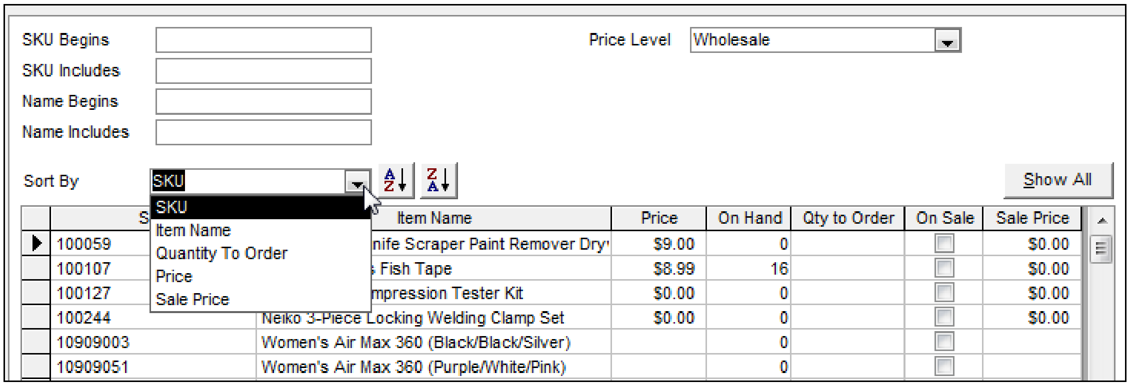


The **Add New Product** window contains three tabs, each having product information fields. When adding a new product to inventory, enter as much information as possible on the **Product Information**, **Custom Fields**, and **Web & Export Fields** tabs.

For more information on these fields and entering new products, refer to Chapter 3, ***Managing Inventory***.

Adding Multiple Products to an Order

The **Multi-Select** button on the **Add Items** screen opens the **Select Items to Add** screen:



- By default, the form opens with all inventory items in the list. The product list can be filtered by entering **SKU** or item **Name** criteria, which can either begin with, or include, the text that is entered. To remove those filters, click the **Show All** button.
- Change the field by which the list is sorted by making a selection in the **SORT BY** drop-down list. The possibilities are: **SKU, Item Name, Quantity to Order, Price, Sale Price**.
- The Price Level selected here applies to all items added to the order from this screen.

Note: *The default Price Level is "Price," which is the "Reg. Price" on the Inventory screen. To set additional Price Level options for each product, go to* ***System Parameters*** *and select the* ***Pricing*** *group. Set* ***UseMultiLevelPricing*** *to TRUE, and then provide names for each additional pricing level (e.g., wholesale) starting with parameter* ***PricingLevel2Name****. The parameter* ***PricingLevel1Name*** *has been pre-defined as the default "Price". Up 10 price levels can be defined. After naming the pricing levels, set the pricing level amount on a per-product basis on the* ***Pricing tab*** *of the* ***Inventory*** *screen.*

- To add items to the order, enter quantities for each item to be added to the order in the **Qty to Order** column. When finished, click the **OK** button. The system adds all of the selected products to the order in the quantities indicated.

Road Trips and Trade Shows

This section contains the following topics. If this is your first time using the Road Trips and Trade Shows feature, read the sections in the order presented.

- **Overview of Road Trips and Trade Shows**
- **Adding, Editing, Deleting a Road Trip**
- **Adding, Editing, Deleting a Trade Show** *(Trade Show Road Trips only)*
- **Adding Trade Shows to a Road Trip** *(Trade Show Road Trips only)*
- **Creating a Road Trip Data File**
- **Pulling Inventory for a Road Trip** *(optional)*
- **Preparing Your Computers for the Road Trip**
- **On the Road: Preparing to Sell**
- **Selecting a Trade Show** *(Trade Show Road Trips only)*
- **Receiving Inventory** *(optional)*
- **Selling on the Road**
- **Returning Home: Importing Your Trip Data**
- **Viewing Road Trip Data in the Production Data File**
- **Filling backorders from the Road Trip** *(if necessary)*

Overview of Road Trips and Trade Shows

The Road Trip and Trade Shows feature of the Enterprise edition of The Stone Edge Order Manager allows you to take orders while away from the home office. You may take orders at trade shows or sell goods at conventions. Or perhaps you have outside sales people who would like to enter orders while they are on the road visiting customers. With Road Trips and Trade Shows you can enter orders and track inventory while on the road, and then import those orders, along with new customers, credit card transactions, quotes, etc., into the main Stone Edge Order Manager database at the home office when you return.

The following is an overview of how this feature works. The first steps take place at the home office using the production instance of The Stone Edge Order Manager:

1. **Add a Road Trip.** Road trips are given a name, a start and end date, and depending on the type of road show, they can be associated with a salesperson. There are two kinds of road trips: trade shows and outside sales. The salesperson field is required for an outside sales road trip and optional for trade show road trips. “Outside Sales” road trips do not have associated trade shows, however, one “Trade-Show type” Road Trip can include any number of trade shows, allowing you to track the sales by show. For example, you might pull a truckload of inventory and take it to several conventions in one trip, then check in the remaining inventory and import the results when you return to your home office.

   For Trade Show Road Trips Only:

   a. **Create Trade Shows.** Next, create your Trade Show(s). (***Note:*** *Outside Sales Road Trips do not have trade shows associated with them.*) Each Trade Show has a name, price level, start and end dates, the state where the show will be held, and the sales tax rate for sales at that show.

   b. **Assign Trade Shows to Road Trips**. Next, tell the program which Trade Shows are part of each road trip. (*Again, Outside Sales Road Trips do not have Trade Shows associated with them.*)

2. **Create the Road Trip Data File**. Create a Stone Edge Order Manager data file to be used on the Road Trip. You can choose which customers and products to include in the data file, or you can include all of them. The Stone Edge Order Manager knows when you are working with a Road Trip data file and does not let you perform certain functions which should only be performed at the main office, such as importing orders from a shopping cart.
3. **Pick and Export Inventory to the Road Trip Data File**. If products are taken from the main store's inventory to sell on the road, you can select the quantity of each product to pull from the store's inventory and add to the Road Trip data file. All of the selected inventory and their quantities is exported to an XML text file (the Inventory Transfer File), and deducted from the main store's inventory. A pick list for the selected items can be printed. This step can be repeated as often as needed to replenish your Road Trip inventory. Simply send another Inventory Transfer File from the home office with the products.

The following steps take place on a workstation that is going on the road and will be using the Road Trip's data file:

4. **Launch The Stone Edge Order Manager and open the Road Trip Data File**. Use the **Switch Stores** button to open the road trip data file. Navigate to the file created previously in step 2.
5. **Select the Current Trade Show.** From the Road Trips and Trade Shows screen (**Main Menu > Settings > Data Functions > Road Trips**), choose the appropriate trade show from the list. Remember that a Road Trip can have multiple trade shows associated with it.
6. **Import the Inventory Transfer File**. This step populates the **Receive Inventory** tab with the list of products and quantities taken from the store's main data file. (Exported in step 3.)
7. **Check In the Inventory**. You can select the items and quantities to be received into the road trip data file and determine how the QOH information should be processed when the data is posted.
8. **Repeat steps 6, 7 and 8 as needed** for additional trade shows or to receive additional inventory for the current trade show.
9. **Enter orders into the Road Trip data file**. Use the Manual Orders screen or the POS (Point of Sale) system.

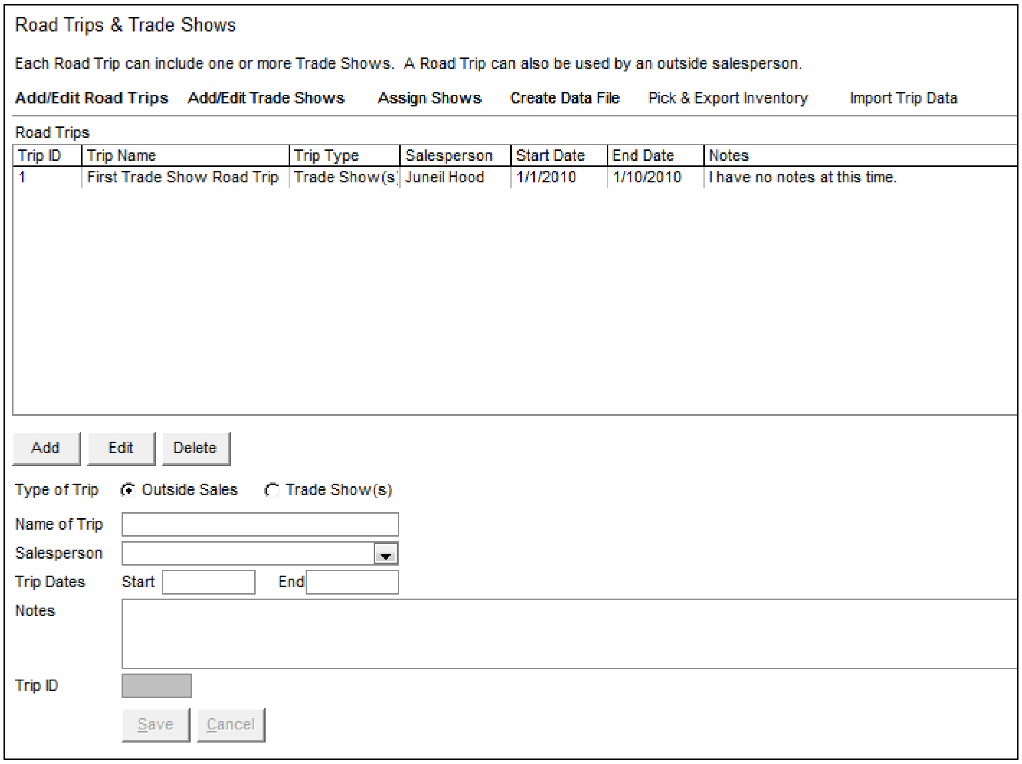
When returning to the office from the road trip:

10. **Import the Road Trip Results**. And check in any returning inventory.
11. **View Your Road Trip Data**. View the Road Trip Data in the main The Stone Edge Order Manager data file.
12. **Fill Backorders** (if necessary).

Each of the steps above is detailed in the sections below.

Adding, Editing, Deleting a Road Trip (Production Data File)

To access the Road Trips screen, go to the **Main Menu > Settings > Data Functions > Road Trips**.



Add a road trip:

1. Go to the **Add/Edit Road Trips** tab.
2. Click the **Add** button.
3. Select the **Type of Trip**, and then fill in the **Name of Trip**, **Salesperson** (optional for Trade Show road trips), **Trip Start Date** and **End Date**.
4. Click the **Save** button.

Edit a road trip:

1. Go to the **Add/Edit Road Trips** tab.
2. Select the trip you want to edit.
3. Click the **Edit** button.
4. Make any changes.
5. Click the **Save** button.

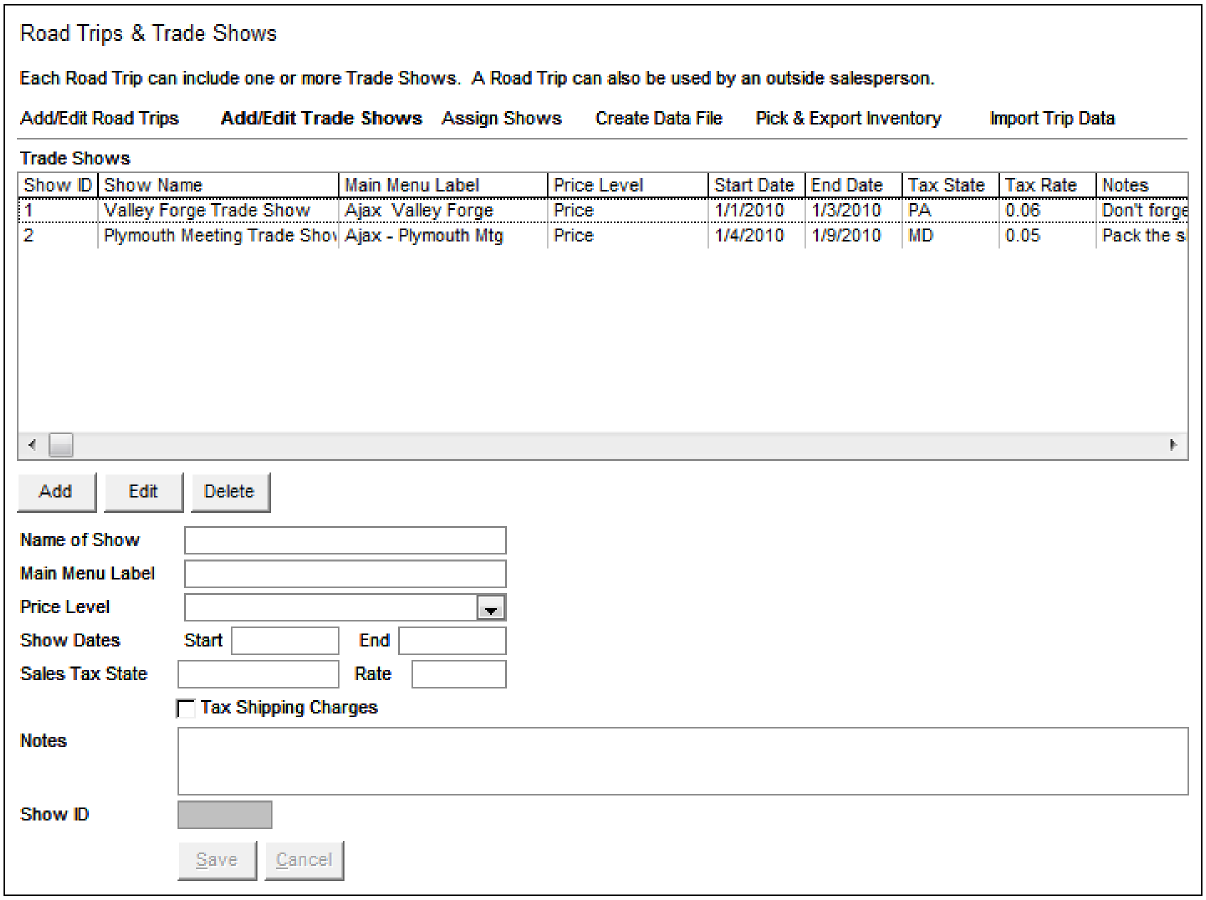
Delete a road trip:

1. Go to the **Add/Edit Road Trips** tab.
2. Select the trip you want to delete.
3. Click the **Delete** button.

Note: It is not possible to delete a road trip for which inventory was exported.

Adding, Editing, Deleting a Trade Show (Production Data File)

To access the Road Trips screen, go to the **Main Menu > Settings > Data Functions > Road Trips**.



Add a Trade Show:

1. Go to the **Add/Edit Trade Shows** tab.
2. Click the **Add** button.
3. Fill in the information about the show.
4. Enter a unique, meaningful name to identify the Trade Show in the **Name of Show** field.
5. The **Main Menu Label** field is the name that The Stone Edge Order Manager displays on the Main Menu when using the Road Trip's data file.
6. The **Price Level** field allows you to choose whether to use the regular price or a pre-defined price level, such as wholesale, for goods sold at this show.
7. Enter the beginning and ending dates of the Trade Show in the **Start a**nd **End** fields.
8. Type the location of the Trade Show in the **Sales Tax State**.
9. Enter the appropriate sales tax rate for the location in the **Rate** field. The program initially displays the number as a percentage but stores and displays it as a decimal value after the Trade Show record is saved.
10. The **Notes** field can be used to record additional text related to the Trade Show.
11. Click the **Save** button.

Edit a Trade Show:

1. Go to the **Add/Edit Trade Shows** tab.

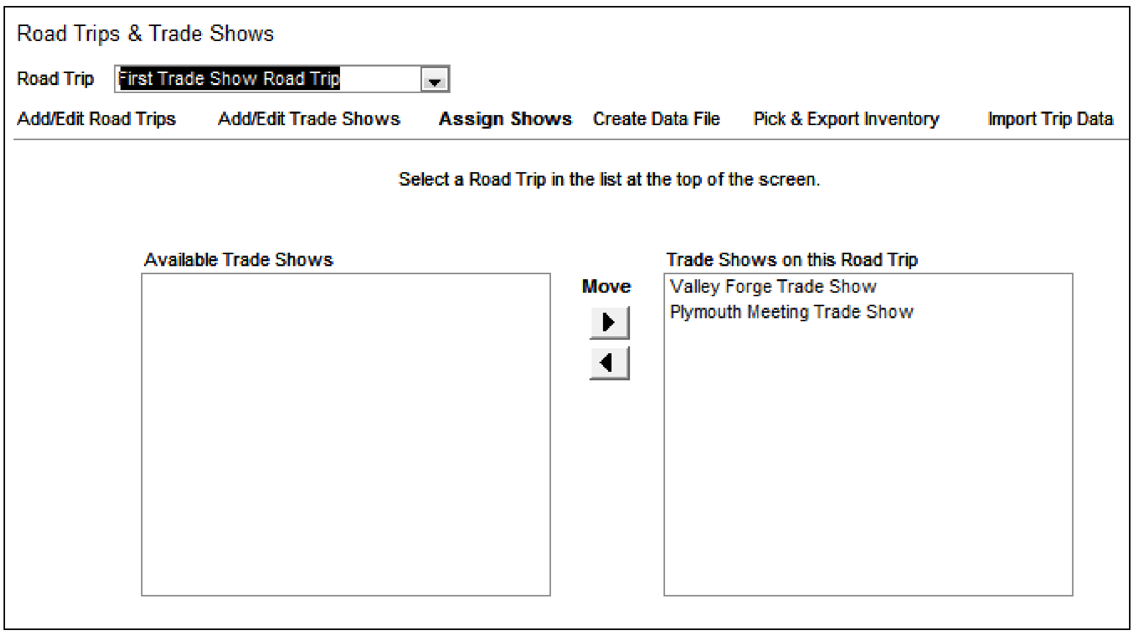
2. Select the show you want to edit.
3. Click the **Edit** button.
4. Make any changes.
5. Click the **Save** button.

Delete a Trade Show:

1. Go to the **Add/Edit Trade Shows** tab.
2. Select the show you want to delete.
3. Click the **Delete** button.

Adding Trade Shows to a Road Trip (Production Data File)

To access the Road Trips screen, go to the **Main Menu > Settings > Data Functions > Road Trips**.



Assigning Trade Shows to Road Trips:

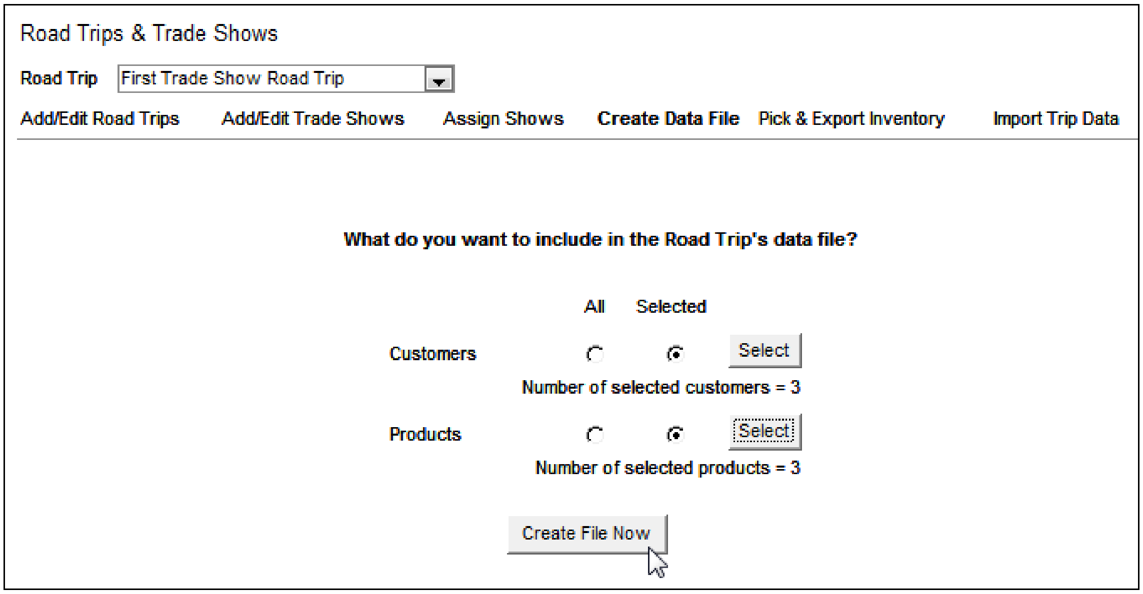
1. Select the **Road Trip** in the drop-down list at the top of the screen.
2. Click the **Assign Shows** tab.
3. Select a trade show from the list labeled **Available Trade Shows** on the left-hand side of the screen.
4. Click the **top (right) arrow** button to add the selected Trade Show to the current Road Trip. The name of the trade show appears in the right-hand side of the screen labeled **Trade Shows on this Road Trip**.
5. To remove a Trade Show from a Road Trip, select the **Trade Show** on the right-hand side of the screen, and then click the **bottom (left) arrow** button.

***Note**: An individual Trade Show can only be assigned to one Road Trip. However, a Road Trip (Trade Show type) can have multiple trade shows associated with it. Outside Sales road trips cannot have trade shows associated with them.*

Creating a Road Trip Data File

To create a Stone Edge Order Manager data file for a Road Trip:

1. Go to **Main Menu > Settings > Data Functions > Road Trips**. Click the **Create Data File** tab.
2. Select a **Road Trip** from the drop-down list at the top of the screen. (Defined in previous steps.)
3. Determine how many customer records are included in the data file by performing one of the following options:
   a. To limit the number of customer records, click the **Selected** radio button in the Customers box and then click the **Select** button. The Search for Customers screen opens. Enter the selection criteria. Click the **Begin Search** button to return to the **Create Data File** tab and see the total number of records found by the search and are added to the road trip data file.



   b. To include all Customer records in the road trip data file, click the **All** radio button next to Customers.
4. Determine how many product (inventory) records to include in the data file by performing one of the following options:
   a. To choose a limited number of products to include in the data file, click the **Selected** radio button next to **Products** and then click the **Select** button. The Select Items screen opens. Enter the selection criteria and press **Enter** or **Tab** to produce a list of items. Click the **Include These Items** button to return to the Create Data File tab and see the total number of products selected for addition to the data file. Refer to the figure in step 3a.

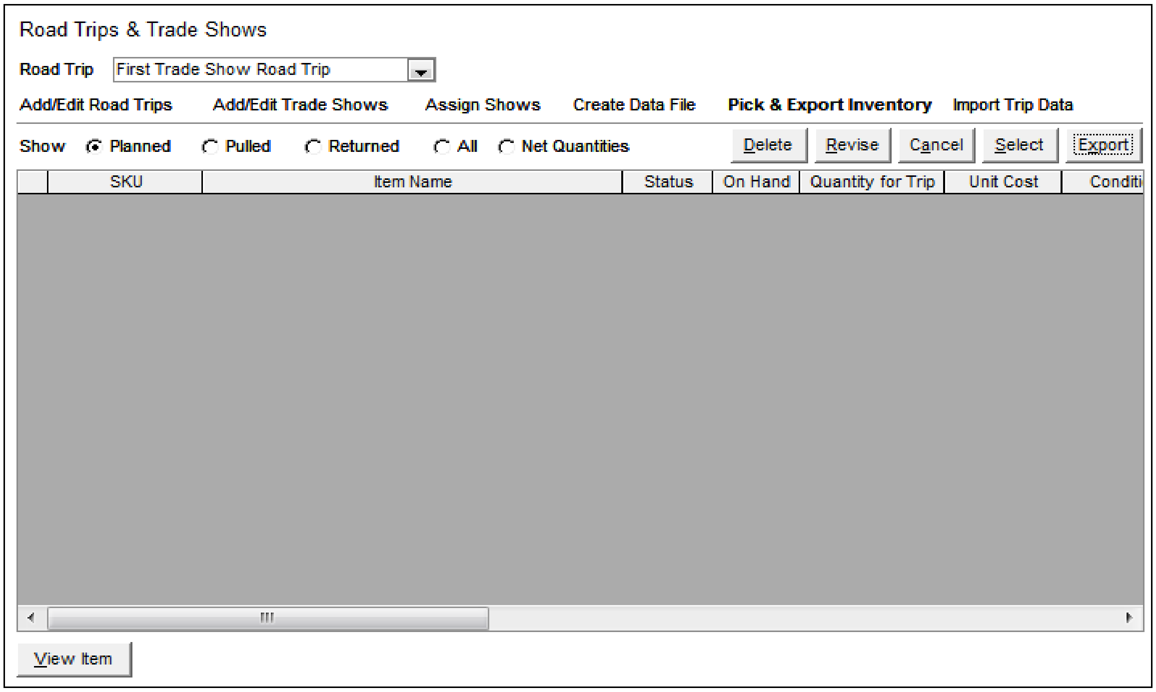
   b. To include all Products in the data file, click the **All** radio button next to Products.

<u>Note:</u> *It is only possible to search for and select items* ***once*** *from the screens mentioned in steps 3a and 4a (above). The program will not build a cumulative list if these actions are performed more than once. If the desired product SKUs are not named similarly so that they are returned by a single set of search criteria, it would be best to include all SKUs in the data file.*

5. When the records to be included are chosen, click the **Create File Now** button. The program prompts for a file name and location of the road trip data file. If possible, direct it to a workstation which is going on the road. Otherwise, make a note of the location where it is saved so that it can be moved at a later date to a computer going on the trip. When the file is created, the program displays the following message box, stating the name and location of the road trip data file:

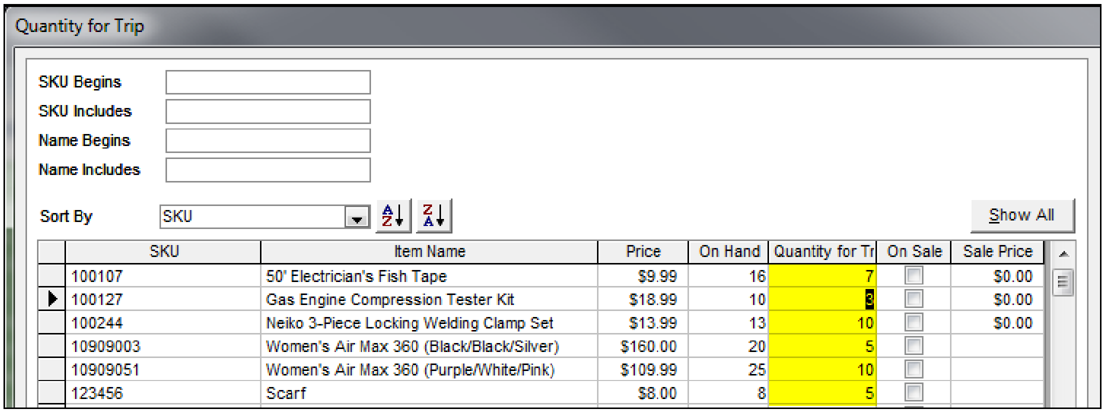
Pulling Inventory for a Road Trip

It is possible to take inventory along for both types of Road Trips, Outside Sales and Trade Shows. This step is only necessary if products will be taken from inventory to sell on the trip. Otherwise, items that are ordered on the road will be treated as being backordered (provided that the system parameter, **CheckInventory**, is set to TRUE). At the end of the trip, the orders taken on the road trip are imported into the main or production The Stone Edge Order Manager data file, where they can then be filled and shipped. If no inventory is taken on the road, go on to the next section entitled, *Preparing Your Computers for the Road Trip*.

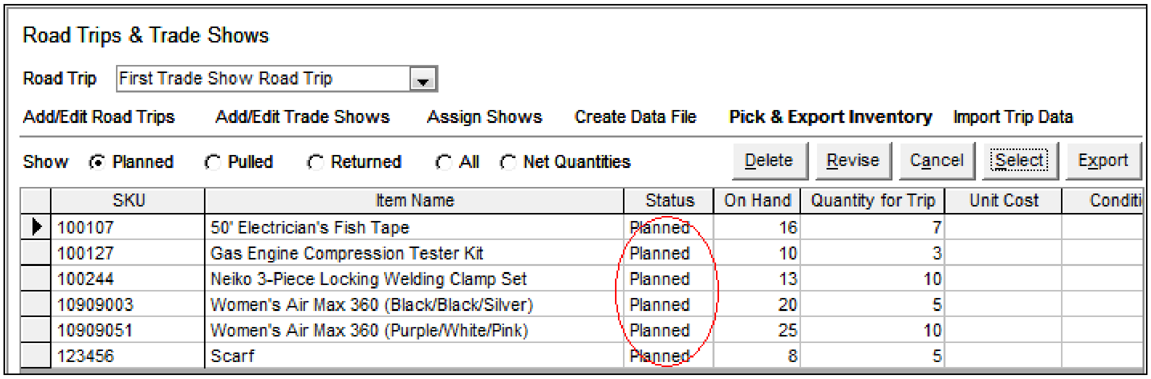


To select the items to take on your trip:

1. Go to the **Pick & Export Inventory** tab.
2. Select a **Road Trip** from the drop-down list at the top of the screen.
3. Click the **Select** button. The Quantity for Trip screen appears:



4. Scroll through the inventory list, or use the filters at the top of the form to limit the items displayed. Enter the quantity of items that are to be taken on the trip in the **Quantity for Trip** column on the respective row for each SKU. The quantity entered in the **Quantity for Trip** field cannot exceed the **On Hand** value.
5. Click **OK** to return to the **Pick & Export** Inventory tab, where the selected items are listed.



6. At this point, the selected items are marked as having a status of "planned", and have not yet been deducted from the main store's inventory. You can leave this screen and return later to continue planning the trip without losing any of your work. Items can be planned and pulled multiple times for the same trip.
7. Note the different **Show:** options on the **Pick & Export** tab that control which items are viewed:
   a. **Planned**: Items that you plan to take, but have not yet been pulled from inventory.
   b. **Pulled**: Items pulled from inventory and exported into an XML formatted text file for transfer to the road trip's data file.
   c. **Returned**: Items returned to inventory following the end of the road trip.
   d. **All**: All of the planned, pulled, and returned items for the current road trip.
   e. **Net Quantities**: For items that have been pulled, this shows the quantity pulled, returned, and net quantity out (assumed to have been sold or otherwise disposed of).
8. Use the **Delete** and **Revise** buttons to make any changes necessary. *Or,* click **Cancel All** to start over, deleting all data for the selected road trip and returning any pulled items into inventory.
9. To pull the current **Planned** inventory quantities from inventory, click the **Export** button.
10. Click **OK** to create the Inventory Transfer File (XML-formatted) used later to import the product QOH information into the road trip data file. Give the file a meaningful name and make a note of its location. This file must either be saved on a workstation that is going on the trip or it must reside on a network location that is accessible from the road.
11. Choose **Yes** or **No** to print a pick list for pulling the physical items from the warehouse.

Preparing Your Computers for the Road Trip

1. Install The Stone Edge Order Manager on the computer(s) going on the road trip. If you plan to use more than one computer at the same trade show, arrange to network them together so they can share the same data file upon arrival.
2. Move the Stone Edge Order Manager data file created in the previous step, Creating a Road Trip Data File, onto one of the computers going on the road trip, if it is not already there. If using multiple computers, the computer hosting the data file acts as the file server for the remaining PCs. It can also be used as a workstation.

On the Road: Preparing to Sell

1. Launch The Stone Edge Order Manager on a road trip workstation, and open the Road Trip data file (**Main Menu**> **Switch Stores)**.The Select Store to Open screen appears. The first time that the road trip data file is opened on a workstation, it is necessary to click the **Browse** button, navigate to the location of the road trip data file, and then select the file. If the road trip data file was already on the workstation, simply select it from the list of stores in the Select Store to Open screen and click **Open**.

2. Outside Sales road trip users, skip to the section entitled, *Receiving Inventory*, later in this section.

Selecting a Trade Show (optional)

Note: This step does not apply to Outside Sales road trips.

1. Open Road Trips (**Main Menu > Settings > Data Functions** > **Road Trips)**. Because you are using a road trip data file, the screen is different than what you are accustomed to seeing when using the production store's data file:
2. **Select the current Trade Show** from the list on the Current Trade Show tab and click the **Save** button. Be sure to repeat this step at the beginning of each trade show so The Stone Edge Order Manager can track the sales from each show separately.

Receiving Inventory in the Road Trip data file (optional) **in the**

Note: This step is only required when products are taken on the road to sell.

1. Click on the **Receive Inventory** tab. (**Main Menu >Settings > Data Functions > Road Trips**.)
2. Click the **Import Inventory Transfer File** button. Navigate to the location of the inventory transfer file and click **Open**. (The XML-formatted Inventory Transfer File was generated when inventory was pulled for the Road Trip. Refer to *Pulling Inventory for a Road Trip*, earlier in this section.)
3. The program lists the items in the transfer file. Click **OK**.
4. Check-in the inventory. There are three ways to do that:
   a. Click **Receive All** to set the quantity received for each item to the quantity expected.
   b. Enter the received quantities by typing them into the **Qty Received** column.
   c. Scan the items with a barcode scanner. The scanner must be properly configured for use with The Stone Edge Order Manager. See the Knowledge Base for more information.
5. It is also possible to:
   a. Click **Clear All** to reset the quantity received for all items to zero.
   b. Click **Delete All** to remove all of the item data from this screen and start over.
6. Once the quantity received is correctly set for each product, choose one of the following **Actions:**
   a. Select **Replace QOH** to replace the quantity on hand for the items listed on the screen with the quantity received. Note that the QOH for items in the road trip data file always starts at zero, and is increased when an inventory transfer file is imported. If you only import one transfer file, **Replace QOH** and **Add to QOH** produces the same results.

b. Select **Add to QOH** if the inventory transfer file represents additional or replenishment inventory received during a road trip.

c. **Cancel Items with Zero Received** option: Leave this option un-checked if you expect additional deliveries for the products that are contained in the current Inventory Transfer File, or if you have not logged everything in yet and want to continue doing so at a later time. If this option is checked, the program assumes that any item with a quantity received of zero is missing and is not received.

7. Click the **Post Data** button to complete the process and update the quantity on hand information for products in the road trip data file.
8. Click the **OK** button when the inventory import has been completed.
9. Click the **Exit** button to close the Road Trips & Trade Shows screen.

Selling on the Road

Use the **Manual Orders** screen and/or the **POS (Point of Sale)** screen to enter orders during your road trip. If you have taken inventory with you on the trip, the program tracks your inventory, provided system parameter **CheckInventory** is TRUE. If no inventory was taken on the road, the program treats the items ordered as backordered ("needed") and they are filled upon returning to the home office at the end of the trip. Quotes can also be created while on a trip. They are imported along with orders, customers, transactions, etc., upon return.

Returning Home: The Final Steps

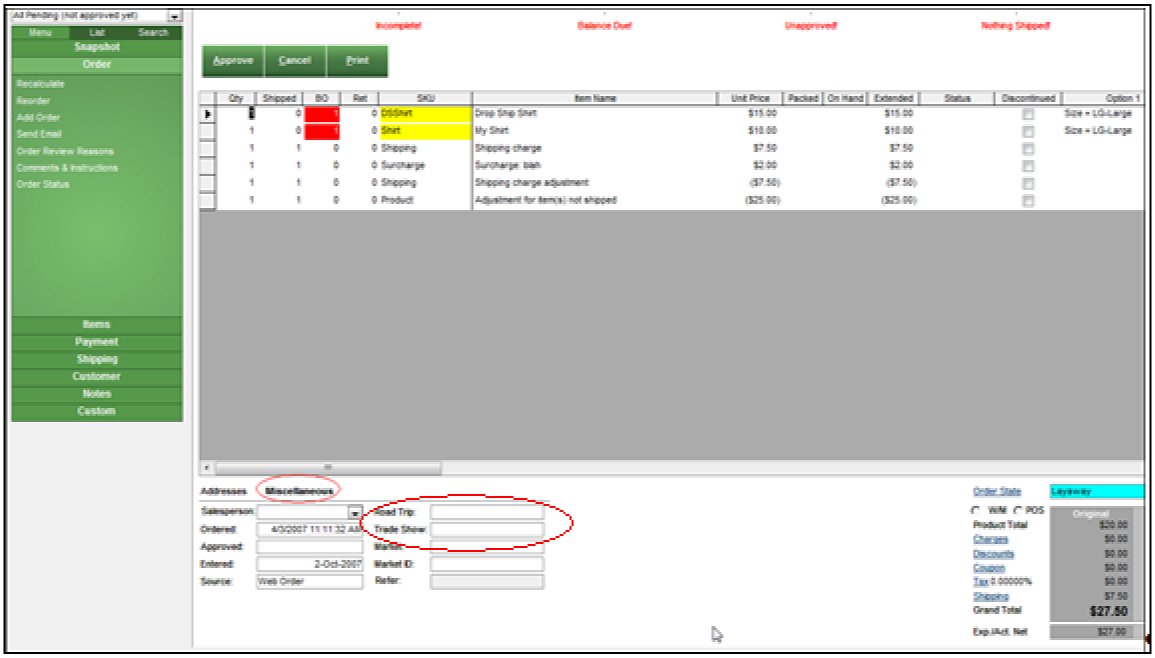
Importing Your Trip Data

Once you have returned to the home office, import the road trip data into the production data file.

1. From a workstation which has access to the road trip data file, open a production instance of The Stone Edge Order Manager. (If the Stone Edge Order Manager instance on that workstation is still linked to the road trip data file, go to **Main Menu > Switch Stores** and choose the production store data file from the list.)
2. Make a backup of the current production data file and make a note of its name and location, as a precaution in the event that an error occurs during the import process.
3. Once a backup is created, go to **Main Menu > Settings > Data Functions** > **Road Trips**, to open the Road Trips & Trade Shows screen. Click the **Import Trip Data** tab. Initially, the screen is mostly blank.
4. Click the **Open Database to Import From** button. Navigate to the location of the road trip data file and open it.
5. If any inventory was taken on the trip, the screen lists the items pulled for the trip and also display a summary about the orders and inventory information contained in that file. If no inventory was taken, skip to step 7. Otherwise continue with step 6.
6. Enter the quantity of each item that was *not* sold by the end of the trip and should be returned to the store's main inventory. Use the **Receive All** button, manually enter the data directly into the **Returned** column, or use a barcode scanner to log in the items. Use the **Clear All** button to clear the data (for all items) entered into the **Returned** column and start over, if necessary.
7. Click the **Post Data** button to import the inventory data, orders, customers, quotes, etc. from the Road Trip data file into the main data file.
8. Create another backup of the production data file at this time.
9. Although the program does not allow a road trip data file to be imported more than once, it would be a good practice to delete the link to the road trip data file from the Select Store to Open screen (Switch Stores) to prevent new orders from accidentally being created there.

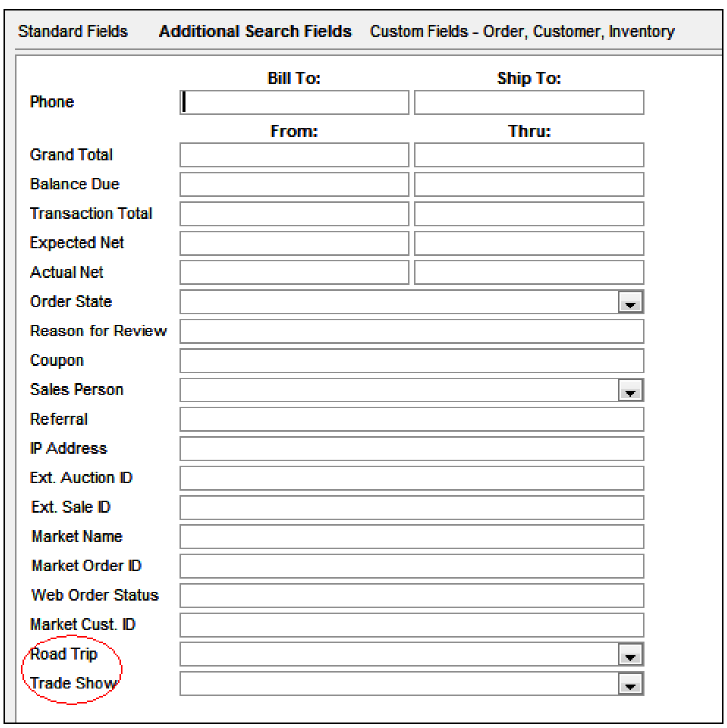
Viewing Road Trip Orders in the Production Data File

The source of individual road trip orders can be seen by going to **Main Menu > Process My Orders > View and Process My Orders > Order or Items** tab **> Miscellaneous.**



To locate orders from a particular road trip or trade show:

1. **Main Menu > Process My Orders > Search > Advanced Search**
2. Click the **Additional Search Fields** tab and select a **Road Trip** and**/**or **Trade Show** from the drop-down lists in the fields with the same names
3. Click **Begin Search**:



When orders are imported from a Road Trip data file, the production instance of The Stone Edge Order Manager assigns them a new order number. The original order number from the Road Trip is treated similarly to a Web order number. In this case, it has a prefix of **RT-**, plus the **Road Trip ID Number-** and the **Original Order Number**. For example, order number 1234 from Road Trip 34 would have an order number of RT-34-1234.

Filling Backorders from the Road Trip

Orders taken during the road trip which contain back-orders can now be filled, provided there is enough stock on hand in the production data file. At Process Orders, use the **Backorders to be Filled** quick filter and manually fill the orders one by one, *or* use the Fill Backorders batch process found at **Main Menu > Settings > Inventory Functions** > **Fill Backorders**.

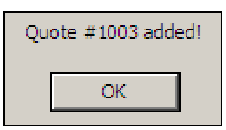
Managing Quotes

Quotes are the way to give a customer an estimate when they are not ready to place an order . To access the **Quotes** window, simply click the **Quotes** button on the **Manual Orders** screen.

Creating a Quote

Refer to ***Entering Manual Orders*** *earlier in this chapter for more* information on creating manual orders.

1. Enter the customer and product information through the Manual Order wizard.
2. Stop at the **Messages/**Notes tab. Do *not* enter **Payment** information and do *not* **Save** the order.
3. Click **Quotes.**
4. Select T**his is a new Quote**.
5. Give the quote an **Optional Reference #.**
6. Enter the number of copies to be printed.
7. Click **Save**.
8. If a discount was entered for the quote, the system asks whether to save the discount type. Select **Yes** or **No**.
9. The system displays the **Send Email** window:
10. Select an email **Template** tab. You can Edit the message, if needed, and then click **Send**.
11. The system sends the email and displays the following confirmation:

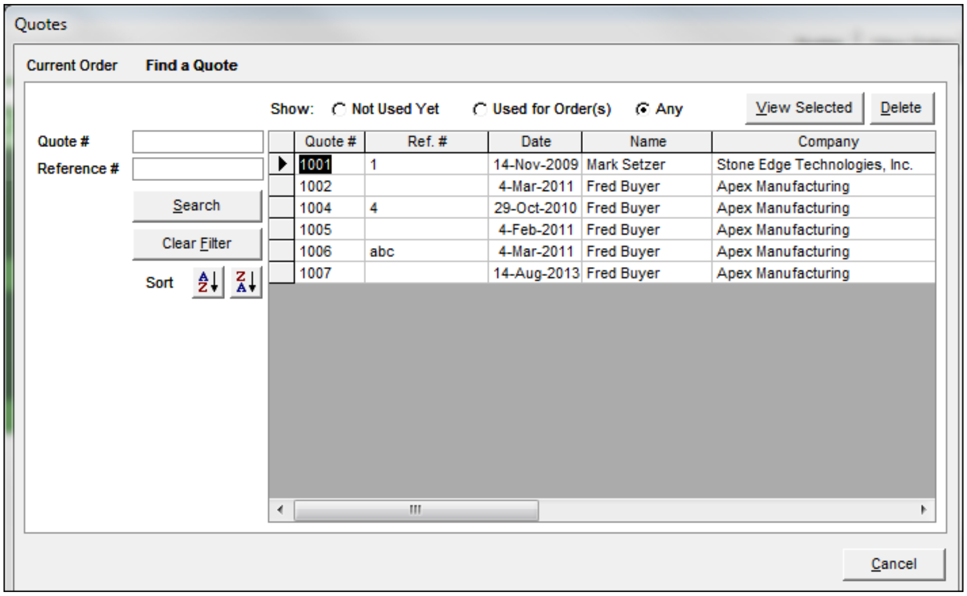


12. Click the **OK** button.

Changing a Quote to an Order

Once a quote is created for a customer, changing it to an order is easy.

1. To access the Quotes window, simply click the **Quotes** button on the Manual Orders screen.



2. Select the **Find a Quote** tab. Scroll through the list, enter the **Quote #** or **Reference #,** or use the **Search** button to locate a quote. Once found, click its row to select it.
3. Select the **View Selected** button to view the details of the quote at the Manual Orders screen.
4. The quote can be edited, just as any other order can, if any changes need to be made to items or customer information.
5. To save the quote as an order, go to the **Payment** tab and process or log the payment information.
6. Proceed to the **Summary** tab and click the **Save** button.
7. The program asks for confirmation to save the quote as an order. Click **OK**.

Note: *To re-save the order as a quote, select the* ***Quotes*** *button and select* ***I've made revisions to an existing Quote****.*

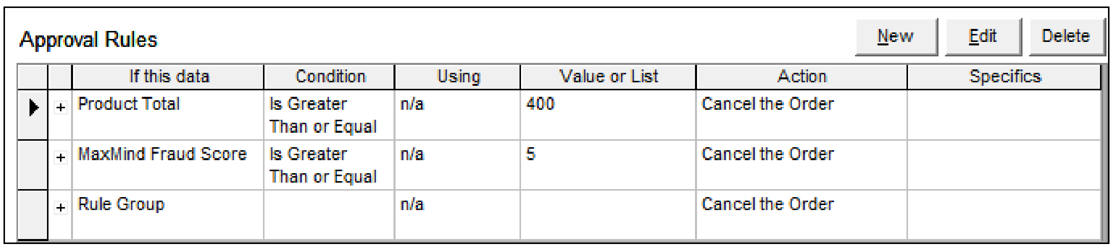
Approval Rules

The Approval Rules system is used to automate the order review and approval process. Approval rules are applied to orders during import from a shopping cart. As order volume increases, it becomes more time consuming to review each order manually to determine if it can be processed immediately or not. By defining approval rules, you can have The Stone Edge Order Manager automatically approve, unapprove, or cancel orders based on the criteria you specify.. This system is also used to change shipping methods or change the “state” of an order.

This section covers the following topics.

- **Understanding the Approval Rules Screen**
- **Creating Single Test Approval Rules**
- **Creating Rule Groups**
- **Editing Approval Rules**

Understanding the Approval Rules Screen



If this data –this field identifies the piece of order information being interrogated. The possibilities are:

- Destination Address1, Address 2, Address Combined, City, State, Zip, Company, Country
- There is a separate Ship To address
- AVS from web store
- AVS from authorize or capture on import
- Shipping Method
- Product Total
- Weight of order less backorders
- Weight of Complete order
- Any SKU in the order
- Payment Method
- CC Info Field
- Email, phone, or IP # in Do Not Ship To list
- Credit card charge at import is declined
- Comments
- MaxMind Fraud Score
- Number of Drop Ship Vendors

Condition – identifies the comparison operation:

- Includes
- Equals
- Doesn't Equal
- Begins with
- Is Greater Than or Equal To
- Is Less Than or Equal To
- Is Between

***Note**: These choices do not apply to every field that can be tested, and each comparison expression has different choices in the **Require:** section.*

Using – identifies the requirements of the condition, such as:

- **Exact value entered** – the data being tested must equal the value entered to return a result of True
- **Any of list** – if the data being tested contains "ANY" of the items in the delimited list, the test result is TRUE. This is an implied "OR" situation.
- **All of List** – if the data being tested contains "ALL" of the items within the delimited list, the test result is TRUE. This is an implied "" situation.

***Note**: All of these choices are not necessarily available for all comparison expressions. Some comparisons do not have any choices in the **Require:** section.*

Value or List – identifies a value or list of values being compared

Action – indicates the action the program takes when the rule condition is met

- Approve(the order)
- Do not approve the order
- Cancel the order
- Set the shipping method to the selected shipping method
- Set the order state to the selected state

Specifics – this field only contains a value for rules that change the data being compared, such as shipping methods or order states, and reflects the final result

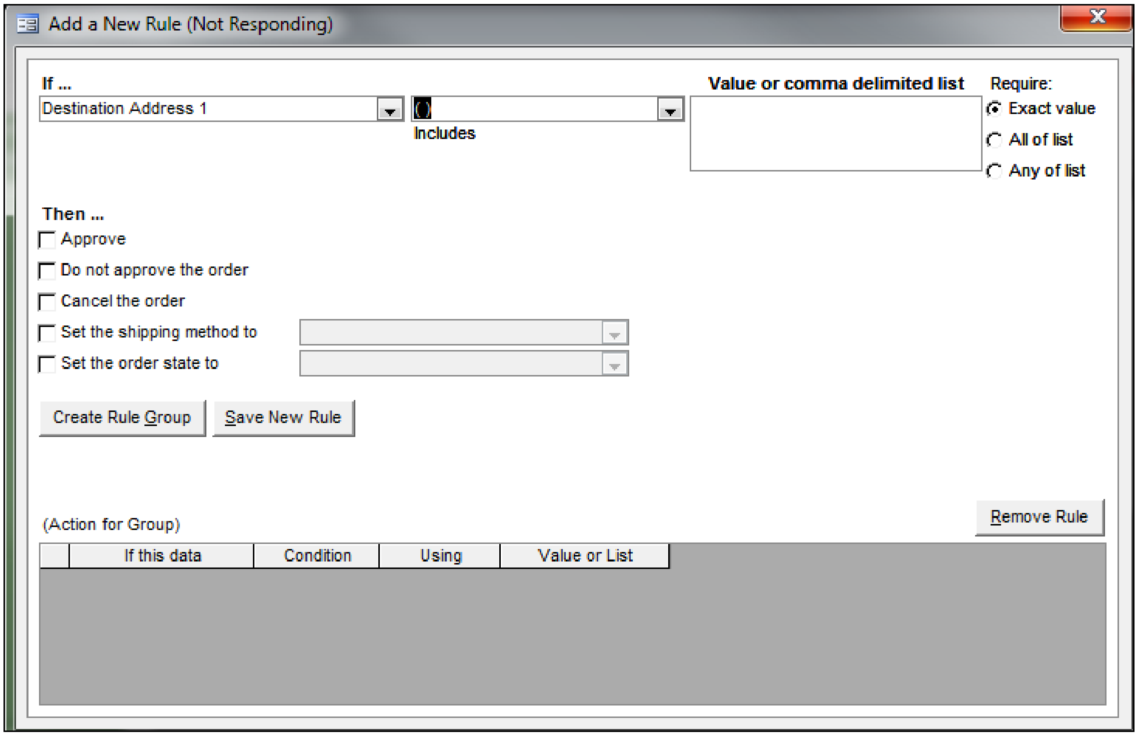
Creating Single-Test Approval Rules

Single-test approval rules allow you to "interrogate" a single field against one or more criteria, and if the criteria are met (result is TRUE), apply a designated action.

To access the Approval Rule system:

1. Go to **Main Menu > Settings > Order Functions** > **Approval Rules**.

2. Click the **New** button to open the **Add a New Rule** form:



3. Make a selection in the first **If...** drop-down.
4. Then select one of the comparison expressions from the adjacent drop-down list.
5. In the **Value or comma delimited list** text box, type in the value for which the program should check. When entering more than one value, separate them by commas, with no spaces.

***Note**: When entering dollar values, do not include dollar signs ($).*

6. Make a selection from the **Require:** section, **Exact value**, **All of list**, or **Any of list** . Choose the **Any of List** radio button if multiple criteria are used in the **Value or comma delimited list**. If a single, specific value is used, enter it into the **Value or comma delimited list** text box, select the **Exact Value entered** radio button.
7. In the **Then...** section choose the action to be taken against an order when the rules are met.

   The choices are:

   a. Approve the order, Do Not Approve the order, Cancel the Order.(Choose only one of the three)
   b. Set the Shipping method to the selected shipping method
   c. Change the Order State to the selected order state.

   When the latter two (b and c) are selected, their respective list boxes become active so that a shipping method or order state can be chosen.
8. Click the **Save New Rule** button.
9. The new rule is displayed in the Approval Rules screen.
10. To delete an approval rule, select its row and click the **Delete** button.

11. If multiple, simple approval rules are defined; it is possible to determine the sequence in which the rules are processed by clicking on the up and down arrows on the right of the screen. Those

higher in the list are processed first. However, if a complex set of approval rules are created, it may not be possible to determine the sequence in which the rules are evaluated.

***Important Notes**:*

1) Any number of Approval Rules may be entered, however, avoid using conflicting rules such as one rule to unapprove the order and another to approve the order. When the action of an approval rule is "Do not approve the order", The Stone Edge Order Manager will not allow a subsequent rule to then "Approve" the order. Once an order meets the criteria to "Do not approve the order," it can only be approved manually.

2) Credit card transactions can only be processed automatically if an order is approved on import. If a credit card order does not meet the approval criteria (the order is not approved automatically), the credit card will not be charged when the order is imported.

Creating Multiple Single-Test Approval Rules with Different Criteria that Apply the Same Action

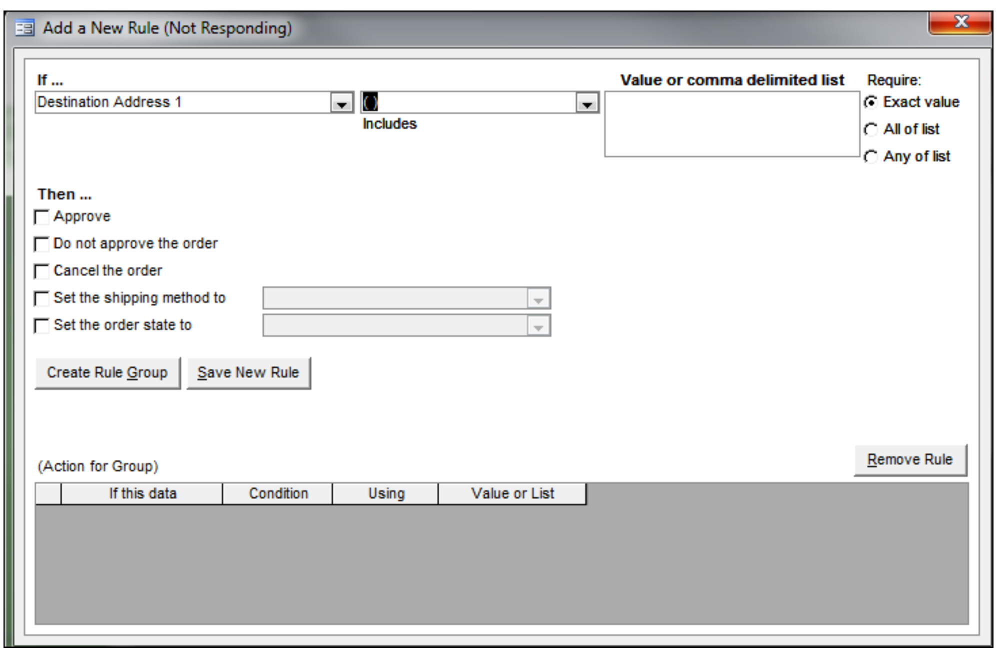
If multiple approval rules are defined which result in the same action, but are based on different fields and criteria, the system assumes an implied "OR" when evaluating the set of approval rules. For example, if there is one approval rule that "cancels" orders requiring shipment outside the US, and another rule that "cancels" orders whose totals exceed $500, and yet another rule that "cancels" orders with fraud scores greater than a specified value, the result is that if *any* of these tests are TRUE, the order is unapproved.

Creating Approval Rule Groups

Approval Rule Groups are used to evaluate multiple conditions before an order is approved The action is executed only when ALL criteria specified in the rule group are TRUE.

The following example demonstrates how to set up an approval rule group that cancels an order if it must be shipped outside of the US, AND the product total is greater than $500, AND the fraud score exceeds a certain value.

1. Go to **Main Menu >Settings > Order Functions > Approval Rules.**
2. Click the **New** button. This opens the **Add a New Rule** screen



3. Make a selection in the first **If...** drop-down.
4. Then select one of the comparison expressions from the next drop-down list.
5. In the **Value or comma delimited list** text box, type in the value for which the program should check. When entering more than one value, separate them by commas, with no spaces.

   ***Note**: When entering dollar values, do not include dollar signs ($).*

6. Make a selection from the **Require:** section, **Exact value**, **All of list**, or **Any of list** . Choose the **Any of List** radio button if multiple criteria are used in the **Value or comma delimited list**. If a single, specific value is used, enter it into the **Value or comma delimited list** text box, select the **Exact Value entered** radio button.
7. In the **Then...** section choose the action to be taken against an order when the rules are met.

   The choices are:

   a. Approve the order, Do Not Approve the order, Cancel the Order.(Choose only one of the three)
   b. Set the Shipping method to the selected shipping method
   c. Change the Order State to the selected order state.

   When the latter two (b and c) are selected, their respective list boxes become active so that a shipping method or order state can be chosen.

8. Click the **Create Rule Group** button.
9. To add another test, click **Add Criteria** and repeat steps 3 through 7, as needed.
12. When you are finished, click the red X to close the screen.
13. The new rule group is displayed in the Approval Rules screen.
14. To delete an approval rule group, select its row and click the **Delete** button.

***IMPORTANT NOTE**: Keep in mind that once a group is created, the Action taken by this group cannot be modified – criteria can only be added or removed. To modify the action, delete the rule group and start over. Also, a rule group must have at least one set of criteria defined before the system can save it.*

The Multi-Order Processor

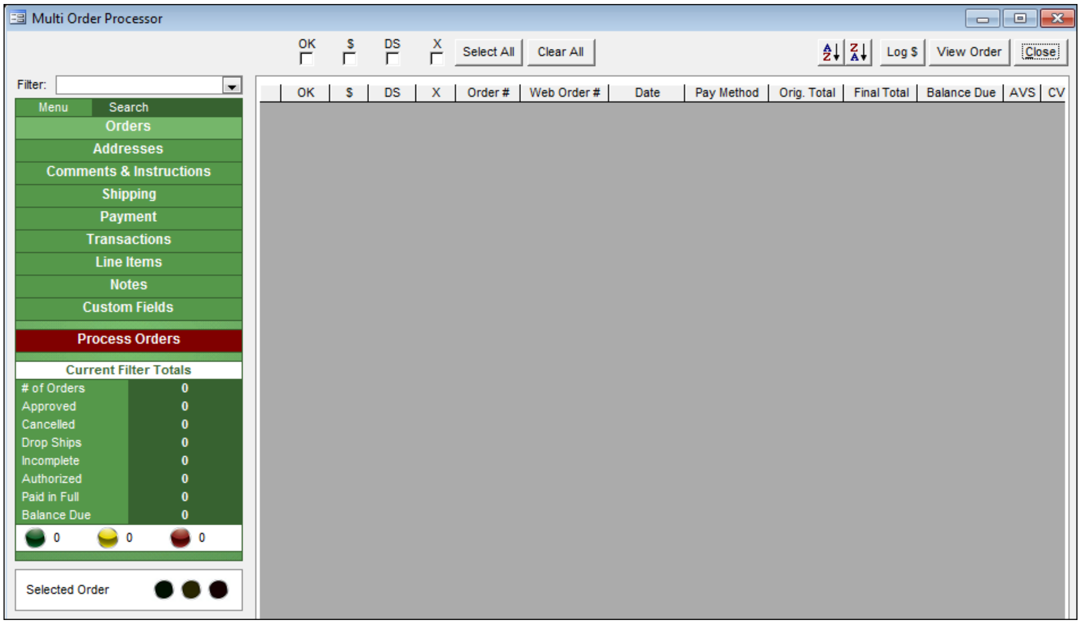
The Multi-Order Processor allows you to work with multiple orders at one time. It can be used to approve or cancel orders, process payments, send drop-ship orders to vendors and emails to customers, and add paperwork to the batch print queue.

Start by setting some system parameters for the functions related to this feature. Then build a list of orders to be processed. Review the orders displayed and use the check boxes or radio buttons to select the action(s) to be performed against them.

Batch Processing Orders with the Multi-Order Processor

Complete the following steps to process multiple orders using the Multi-Order Processor.

1. Go to Main Menu > Process My Orders > Multi-Order Processor.



2. Build a list of orders one of two ways:

  a. Click the Filter drop-down list and make a selection.

  b. Click Search and enter criteria in the Search for Orders dialog box.

3. After the list of orders is built, the total number of orders in the list is displayed in the Current Filter Totals, as well as the sum of approved, incomplete, cancelled ,drop-ship orders, and orders that are paid in full or have a balance due. Refer to the **Knowledge Base** online for more information about the red, yellow and green **Stop Lights** (also known as Dot Formulas) below the Current Filter Totals.

4. Click on the other tabs (**Addresses**, **Comments and Instructions**, etc.) to view additional information about the orders. Each tab displays a different set of fields. The **Line Items** and **Notes** tabs ONLY show the respective data for the currently selected order in the list. The other tabs show the same list of orders in the same sequence.

5. Select one or more of the check boxes in each row to choose the actions to perform against the orders.

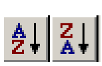
   OK – Approve the order, or include it in a bulk emailing.

   $ – authorize, capture or charge credit card payments using the **Credit Card Mode** selected on the **Process Orders** tab.

   DS – Create purchase orders for any drop-ship items in the order.

   X – Cancel the order.

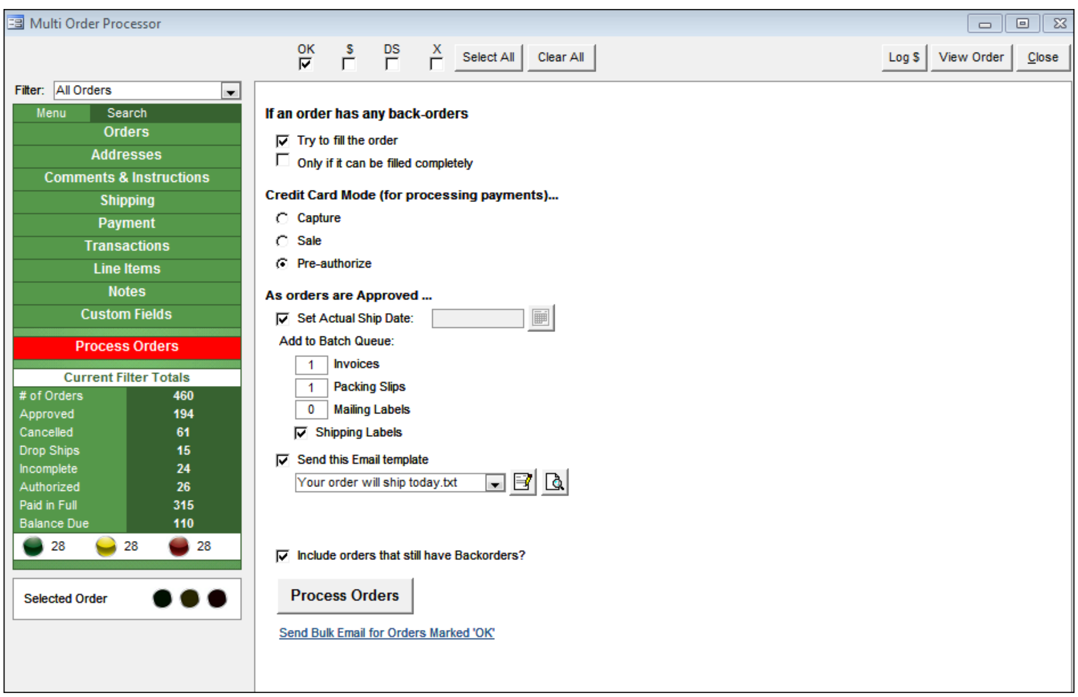
   Tip: Use the individual check boxes at the top of the screen to select orders to be approved, paid, cancelled, or have drop-ship purchase orders created for all orders in the list or use the **Select All** or **Clear All** buttons to select or deselect all orders for approval, payment or drop-ship purchase orders.

   The  buttons are for sorting the list of orders.

The **View Order** button opens the record for the selected order at the Process Orders screen.

The **Log $ Rec'd** button opens the **Enter Amount of Payment Received** window where you can manually log a payment made outside of The Stone Edge Order Manager (for the selected row only).

6. When you are ready to execute the selected actions, click the **Process Orders** tab
7. Make any of the following selections :
    a. **Try to fill the order/Only if it can be fulfilled completely** refers to filling any backorders during the batch cycle
    b. Which **Credit Card Mode** to use: Capture, Sale, or Pre-Authorize
    c. **Set Actual Ship Date** as orders are approved
    d. Specify the number of **Invoices**, **Packing Slips,** and **Mailing Labels** to **Add to the Batch Printing Queue** for each approved order, and whether to add a **Shipping Label** to the queue, as well. The printing of shipping labels requires at least one of the integrated shipping systems to be configured (USPS-DAZzle, UPS Online Tools, or ShipRush/FedEx). Refer to the online Knowledge Base for more information about configuring shipping software.
    e. Select a template from **Send this Email template** if you plan to send confirmation emails to those customers whose orders are approved during the batch cycle.
    f. Select check box, **Include Orders that still have Backorders?**, if The Stone Edge Order Manager should process all orders, including those that have out-of-stock items. If The Stone Edge Order Manager should only process orders where all items are in-stock, clear the check box. If the **Try to fill the order** option is checked, the system attempts to fill backorders first. Afterwards, if an order remains incomplete, it looks to the **Include Orders with Backorders** option to determine whether to approve and complete the order.



8. When all of the desired functions are selected, click the **Process Orders** button to start the batch processing cycle.

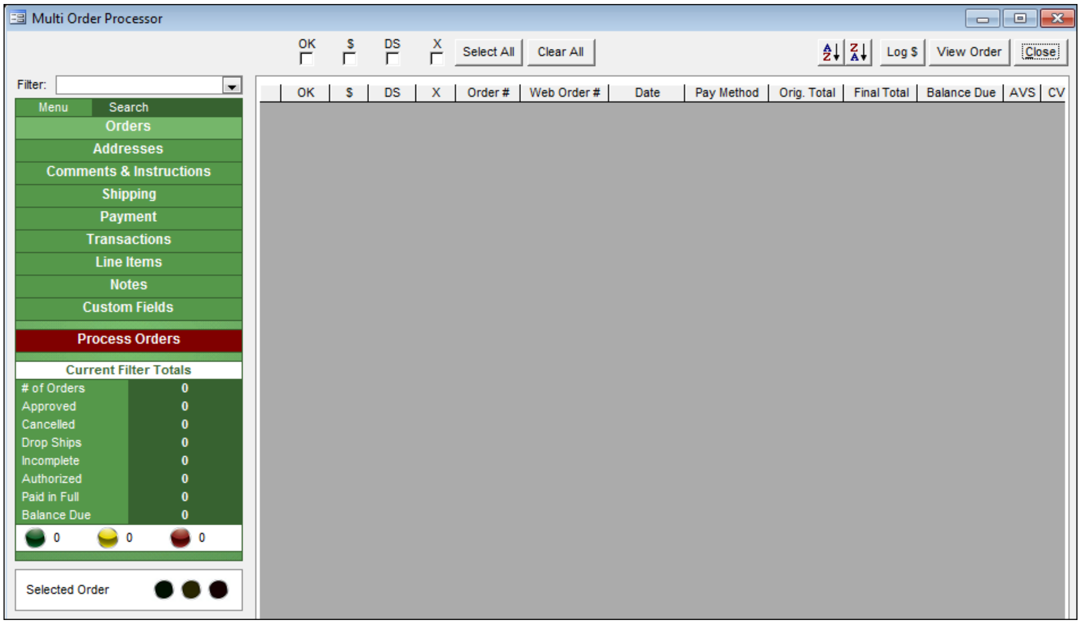
The system displays a progress bar at the bottom of your screen. When the process is finished, the system displays a summary of the results. If you've opted to send email you are notified that the program is sending email.

Send Bulk Email for Orders Marked 'OK' is used to send a group of customers marketing emails. On the **Orders** tab, build a list of orders and select the **OK** check box for one or more orders. Click the **Process Orders** tab and select **Send Bulk Email for Orders Marked 'OK'**.

Sending Bulk Email with the Multi-Order Processor

Complete the following steps to send a bulk email messages using the Multi-Order Processor.

1. **Go to Main Menu > Process My Orders > Multi-Order Processor.**



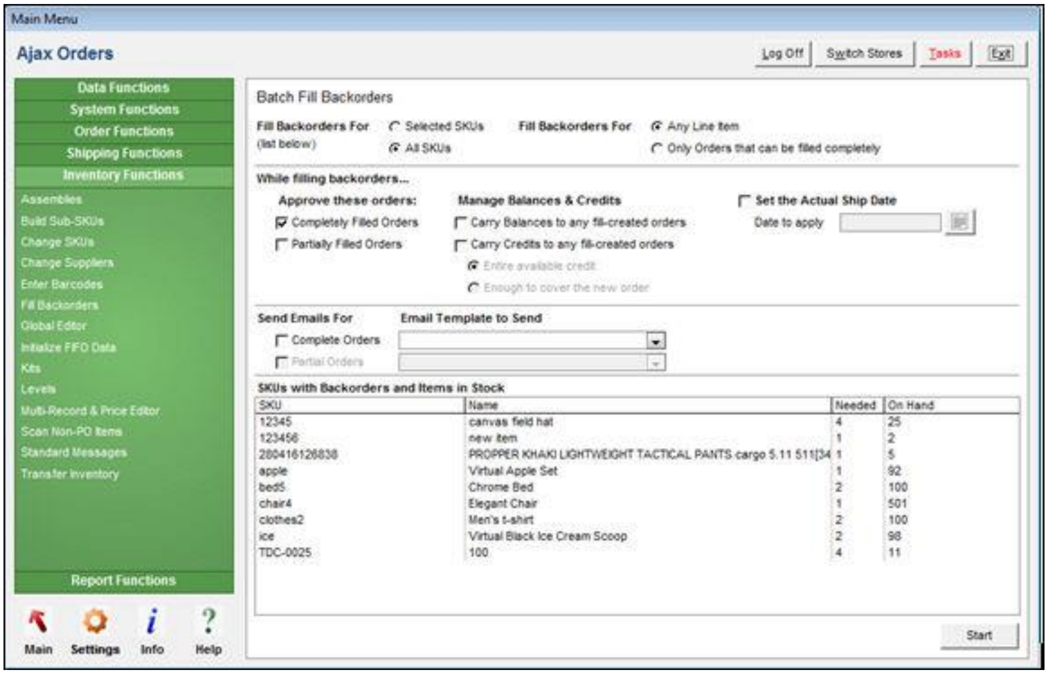
2. Build a list of orders in one of two ways**:**
   a. Make a selection from the **Filter** drop-down list.
   b. Click **Search** and enter criteria in the Search for Orders screen.
3. After the list of orders is built, select the **OK** check box for each order whose customer should receive an email.
4. Select the **Process Orders** tab and click **Send Bulk Email for 'OK' Orders.**
5. The program displays a summary, indicating the number of email messages sent and the number of missing or bad email addresses**.** You are also asked if the **OK** check boxes should be cleared on the **Orders** tab.

Batch Filling Back Orders

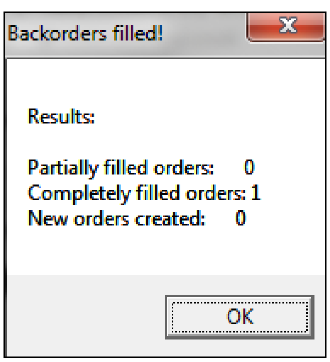
Backorders can be filled one order at a time at the Process Orders screen, or they can also be filled for all products or selected products in batch mode. The latter option is convenient for filling multiple orders when new inventory is received from suppliers. Refer to ***Filling Back Orders***, earlier in this chapter, for information on filling back orders for a single order.

Complete the following steps to batch fill back orders:

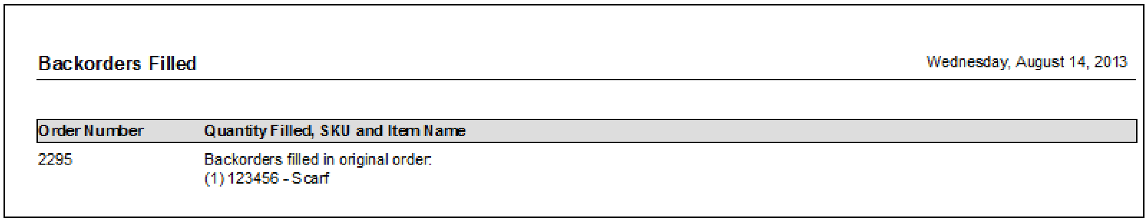
1. Navigate to **Main Menu >Settings > Inventory Functions > Fill Backorders**. The system displays the **Batch Fill Backorders** window:



2. Make your selections to control the actions performed as part of the batch process:
   - Select the target SKUs: **All SKUs** or **Selected SKUs**
   - Choose whether to fill backorders for **Any Line Item** or **Only Orders that can be filled completely**.
   - Automatically approve **Completely Filled Orders** and/or **Partially Filled Orders**.
   - **Carry Balances to any fill-created orders** or **Carry Credits to any fill-created orders**. New orders are created when the program fills backorders for orders which are already approved before the batch process is started. You can select whether to use the **Entire available credit** or **Enough to cover the new order**.
   - **Set the Actual Ship Date** for all orders processed in this batch. If tracking information is to be imported via a text file from the shipping vendor, it may not be wise to check this box. Review the defined Status Events for any conflicts that might arise from selecting this field. See the Knowledge Base for more information about Status Events.
   - If you elected to automatically approve orders, make a selection from the appropriate **Email Template to Send** drop-down box.
3. Click **Start**. The system processes the back orders using the options selected. When it has finished, the results are displayed:



4. Click the **OK** button to close the message and view the **Backorders Filled** report:



Backorders Filled — Wednesday, August 14, 2013

Order Number	Quantity Filled, SKU and Item Name
2295	Backorders filled in original order: (1) 123456 - Scarf

You may want to print this report for your store's records.

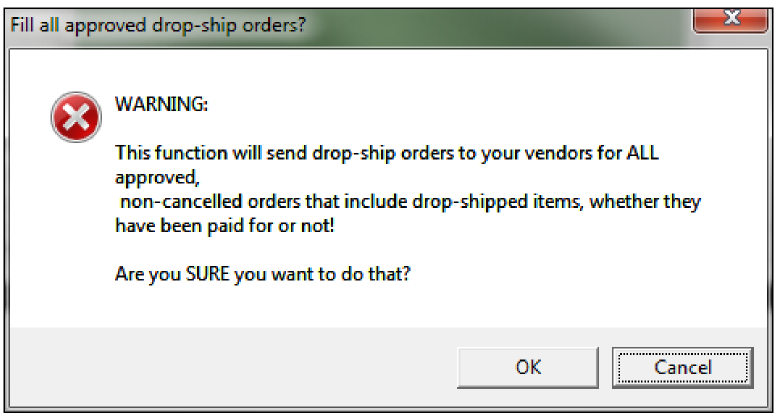
Batch Drop-Shipping

Selecting the **Batch Drop-Ship** function at **Main Menu >Settings > Shipping Functions** causes the program to place drop-ship orders for all unordered drop-ship items in approved orders. System parameter **UseBatchDropShip** must be set to TRUE.

Warning!: *This function sends orders to drop-ship vendors for all approved, non-cancelled orders that include drop-ship items which have not been ordered yet,* ***including orders that have not been paid in full****! Stone Edge Technologies, recommends sending drop-ship orders one order at a time from the Process Orders screen, rather than using this function.*

To batch drop-ship all approved orders, simply navigate to **Main Menu >Settings > Shipping Functions > Batch Drop-Ship**.

Click **OK**.



The system displays a summary of the results, indicating the number of drop-ship purchase orders sent.

Fulfillment Centers

Using a **fulfillment center** is similar to using a **drop-shipper**. The difference is that with a fulfillment center, the merchant's company generally owns the inventory and the fulfillment center does the picking, packing, and shipping for them. The fulfillment center may even be a warehouse owned by the merchant's company which is at a different location than the main office or location where The Stone Edge Order Manager is used. Drop-shipping, on the other hand, the merchant's company never takes physical possession of the inventory; as drop-ship orders are placed, the drop-ship vendor ships them directly to the merchant's customers.

The Stone Edge Order Manager's fulfillment system exports information to a text file as orders are approved. The information generally includes everything required to pick, pack, print, and ship orders. It should not include sensitive information like credit card numbers or the merchant's prices.

Any single order may include a combination of items to be shipped from the merchant's stock, a vendor's stock or items to be shipped via one or more fulfillment centers. Refer to the ***Knowledge Base*** for more information about the fulfillment center system.

There are three parts to setting up fulfillment center exports:

1. Create a **Fulfillment Template** used to format and send order data to vendors.
2. Define a **Fulfillment Center** in The Stone Edge Order Manager.
3. **Assign** products to fulfillment centers.

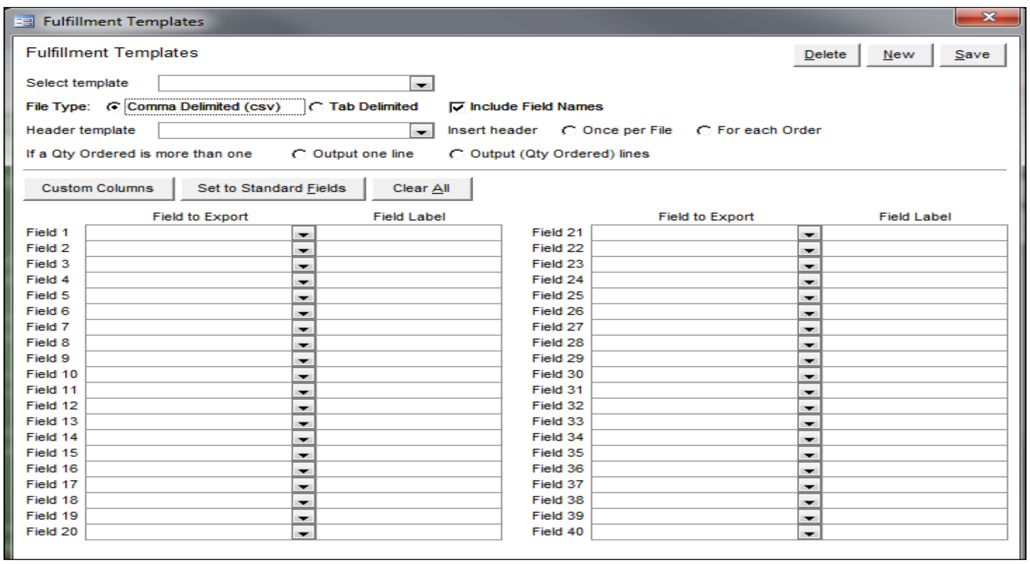
Products can be assigned to fulfillment centers individually, by category, or by system default. Settings for individual products override category and system-wide settings. Orders can be sent to fulfillment centers via email or text files.

Fulfillment Templates

Use Fulfillment Templates to configure the layout of text files created by The Stone Edge Order Manager which are subsequently sent to fulfillment centers.

Creating Fulfillment Templates

1. Go to **Main Menu >Settings > Shipping Functions >Fulfillment > Export Templates.** The system displays the **Fulfillment Templates** window:



2. Click the **New** button.
3. Enter a name for the template and click **OK**.
4. Select a **File Type** for the fulfillment template: **Comma Delimited (CSV)** or **Tab Delimited**. If the vendor accepts either option, it is recommended to use **Tab Delimited**.
5. Select the **Include Field Names** check box if the first row of the text file should contain the field labels.
6. Select a **Header Template** from the drop-down box, if desired, and click the appropriate radio button to have it inserted **Once per File** or **For each Order**. Refer to the following section, *Template Header* for more information
7. The **If a Qty Ordered is more than one:** section tells The Stone Edge Order Manager how it should treat line items where the quantity ordered is more than one. Select the appropriate radio button :

a. **Output one line**, where one of the columns should obviously be the quantity ordered

b. **Output (Qty. Ordered) lines**, where the program adds a separate line for each unit ordered. For example, if the customer ordered 3 of a particular SKU, the text file has 3 identical rows for that one product, one row for each piece ordered.

8. For each field (Field 1-40) to be included in the export file, select the Stone Edge field name from the **Field to Export** drop-down box.
9. If **Include Field Names** is selected, enter the name to appear above each column in the text file by entering it in the **Field Label** column.

> ***Note****: Entering a field label is optional; if none is entered, the program uses the Stone Edge field name as the label. Or you can click* ***Set to Standard Fields*** *to have the program fill in the default values for all fields.*

10. Click the **Clear All** button to erase all data from the template and start over.
11. Optional: To include a column with the same value in every row of the text file, such as the customer ID assigned to by your vendor, select **Custom Column** from the **Field to Export** drop-down list. Then, in the **Field Label** column, enter a label for the column in the text file, followed by a comma, and then the text that should appear in each row. Examples:

    a. Drop Ship Charge, Not Applicable

    b. Merchant ID, AR00234-77

    c. Shipping Method, UPS Ground

12. Click **Save** when all of the desired fields are configured.

Template Header

The Stone Edge Order Manager can also add a “header” to each text file, which contains different fields than the body of the template. The header is simply another fulfillment template which is inserted once at the very beginning of the text file (**Once per File**), or it can be inserted at the beginning of the data for each order in the text file (**For Each Order**).

To add a header template to a fulfillment template:

1. Create and save the header template just as if it were a regular template.
2. With the information for the main template already displayed (either because you are creating a new template or by selecting the template from the **Select Template** list), select the template to use as the header from the **Header Template** drop-down list.
3. Select the **Insert header** option (**Once per File** or **For Each Order**).
4. Click the **Save** button to make the new header template part of the fulfillment template.

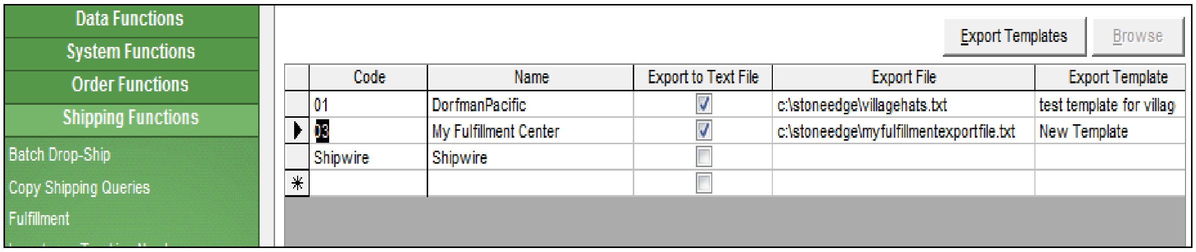
Editing a Fulfillment Template

1. To modify an existing template, go to **Main Menu >Settings > Shipping Functions > Fulfillment**. The system displays the **Fulfillment Templates** window.
2. Make a selection from the **Select template** drop-down list. The system displays the details of the current template.
3. Make any desired changes and click the **Save** button when finished.

Creating Fulfillment Centers

Complete the following steps to create a fulfillment center:

1. Go to **Main Menu > Settings > Shipping Functions > Fulfillment**. The system displays the **Fulfillment Centers** screen:



2. Enter a unique value (up to 20 alphanumeric characters long) to identify the fulfillment center in the **Code** field.

3. Enter a unique, descriptive **Name** for the fulfillment center.

Note: *There are no **Edit**, **Cancel**, or **Save** buttons on this form. Each record is saved upon exiting the row. If a Code and a Name is not entered for a row, the system prompts you to complete these required fields. If a row is entered in error, it is necessary to enter a value in each of these fields before the row can be deleted.*

4. To export data for this fulfillment center to a text file:

   - Click the **Export to Text File** check box.
   - Enter the full path and filename of the text file in the **Export File** field. Click the **Browse** button in the upper right-hand corner to locate the file.
   - Click **Export Templates** and pick an existing template from **Select Template,** or click **New** to create a new template.
   - The Stone Edge Order Manager does NOT automatically send fulfillment text files to vendors! You must do that by one of two methods:

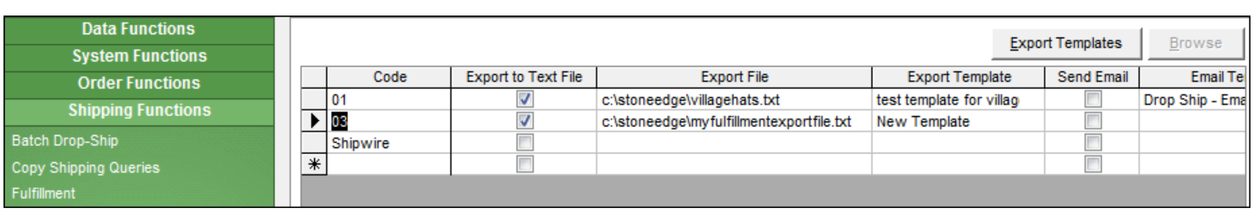
     a. Manually attach the text file to an email message to send to the vendor.

     b. Use an FTP (File Transfer Protocol) application to transfer the text files directly the vendor's system. Contact the vendor for the necessary information to perform the file transfer.

   Warning! *The program creates a separate text file for each fulfillment center, using the file name and location information specified here, if the file does not already exist. If the file does already exist, it **appends** order information to the **existing** file. After sending the text file to the vendor, **DELETE OR RENAME THE FILE** before more order data is appended to it! **Otherwise, orders may be duplicated!***

   Refer to ***Fulfillment Templates***, above, for more information about defining the templates to use when exporting text files to fulfillment centers.

5. To export via email messages:



   - Click the **Send Email** check box.

- Select the **Email Template** from the drop-down list.
- Enter the address where the order file should be sent in the **Email Address** column.

6. Repeat the steps above until all fulfillment centers have been defined

8 Packing Orders

In addition to managing customers, inventory, and orders, The Stone Edge Order Manager can print shipping labels for United Parcel Service (UPS), Federal Express (FedEx) and the United States Postal Service (USPS). It can even help control the order packing process so nothing is left out and the correct items are packed before each order is shipped. Packing orders is an area where human error frequently occurs and can become very costly to the company. The Stone Edge Order Manager's packing interfaces help to eliminate those errors.

This chapter is divided into the following sections that explain the packing process:

Packing Systems

If your order volume warrants having dedicated packing stations, The Stone Edge Order Manager has three systems for packing orders:

- **Packing Only**
- **Pack & Ship**
- **Quick Ship**

The **Packing Only** system works with a barcode scanner to verify each item as it is packed for shipping. This is the older packing system that is not capable of printing shipping labels.

The **Pack & Ship** supports barcode scanners and requires the packer to confirm each item as it is placed in a box. This system includes the ability to print UPS, Federal Express, and U.S. Postal Service shipping labels. For more details about configuring the internal shipping options, refer to the Shipping section of the Knowledge Base.

The **Quick Ship** system is the fastest way to pack an order and print a shipping label because it supports barcode scanners and does not require the packer to confirm each item as it is packed. Shipping labels are printed via the integrated shipping software solutions for UPS, FedEx and USPS, just as with the Pack & Ship system.

To print shipping labels at Pack & Ship, Quick Ship, or other screens within The Stone Edge Order Manager, system parameter for ***ShippingSystem**, must be set. It is possible to use a combination of Quick Ship with either the Packing Only, or Pack & Ship screens.

Setting up the Packers List

Before orders can be packed, regardless of which the system used, it is necessary to create a list of the people who are packers. Navigate to **Main Menu >Settings > Data Functions > List Maintenance**. Select the Packers list, and enter the initials and names of those who pack orders. Refer to ***List Maintenance***, in Chapter 2, for more information.

Setting up Packing Parameters

Go to the **Main Menu > Settings > System Functions > Set System Parameters** and set the following parameters if you use the specific shipping method. The parameters listed below are a subset of parameters which control the various packing/shipping systems of The Stone Edge Order Manager. Please review the entire Shipping and Packing parameter groups for others which might be pertinent for your business environment.

The following system parameters control which packing systems are enabled, and which shipping systems are used:

Parameter	Conditions
FedExShippingSystem	To print FedEx labels though The Stone Edge Order Manager, select **ShipRush**. If you have a current support contract, contact our sales department to obtain a license code at no extra cost.
UPSShippingSystem	To use The Stone Edge Order Manager's built-in support for UPS shipping, select **Order Manager**. To print UPS labels through ShipRush, select **ShipRush**

Parameter	Conditions
USPSShippingSystem	Which system should be used for printing UPS shipping labels? If you use other programs to print labels, such as GalaxyShip, select **None/External**. To print using ShipRush with an Endicia account, select **ShipRush - Dazzle**. To print using ShipRush without an Endicia account, select **ShipRush - Label**. To use Stone Edge's built-in support for USPS, select the **Label** option. Please note that with both "Label" and "ShipRush - Label" postage is not printed and you need to pay for postage at the local post office.
Packing Form	Can be set to **None**, **Packing Only**, or **Pack & Ship**. Select **Packing Only** to use the original form for just scanning items as you pack them. Select Pack & Ship to prints UPS, FedEx and USPS shipping labels as well as confirming items as they are packed.
PackingAllowQuickShip	If set to TRUE, the **Quick Ship** link is visible in the Ship My Orders tab of the Main Menu.
PackingUseDAZzle	If set to TRUE, the packing forms capable of printing shipping labels can print USPS shipping labels via Endicia DAZzle. Requires an Endicia Premium Service account. (To use Endicia via ShipRush, set this to FALSE and **PackingUseShipRushUSPS** to TRUE.)
PackingUseFedEx	If set to TRUE, the packing forms capable of printing shipping labels can print FedEx shipping via ShipRush (requires a FedEx account and a ShipRush account).
PackingUseUPS	If set to TRUE, the packing forms capable of printing shipping labels can print UPS shipping labels via ShipRush *OR* The Stone Edge Order Manager's internal system. Either method requires a UPS Daily Pickup Account. ShipRush requires a license code which can be obtained from our sales department if you have a valid support contract.
PackingUseDHL	ShipRush no longer supports DHL shipments. You may be able to use an ODBC connection with DHL's DB Connect software. Refer to the Knowledge Base for more information.

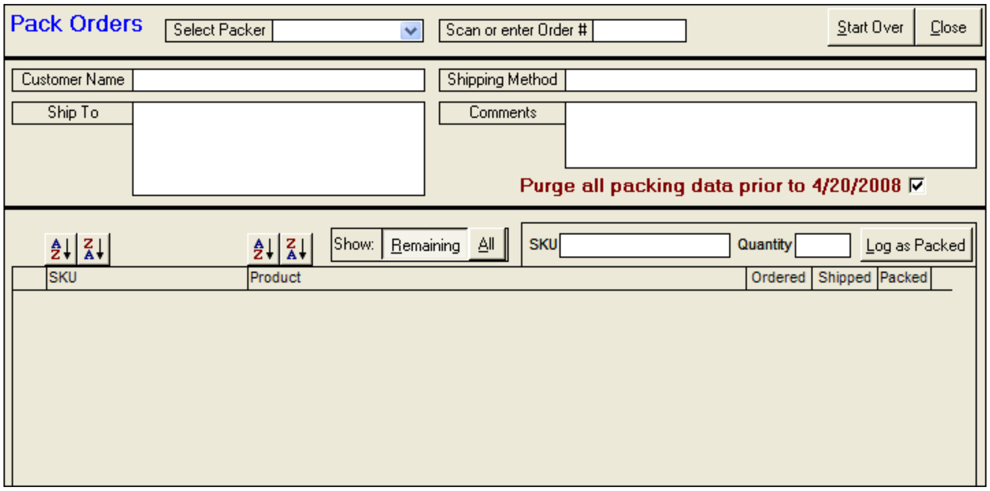
Note*: Please take a few minutes to review the system parameters in the Packing parameter group. There are dozens of other system parameters that control the packing screens and can be configured to fit your business environment.*

Packing Only

Use the Packing Only system to confirm each item as it is packed, without printing shipping labels. Set system parameter, **Packing Form** = **Packing Only**.

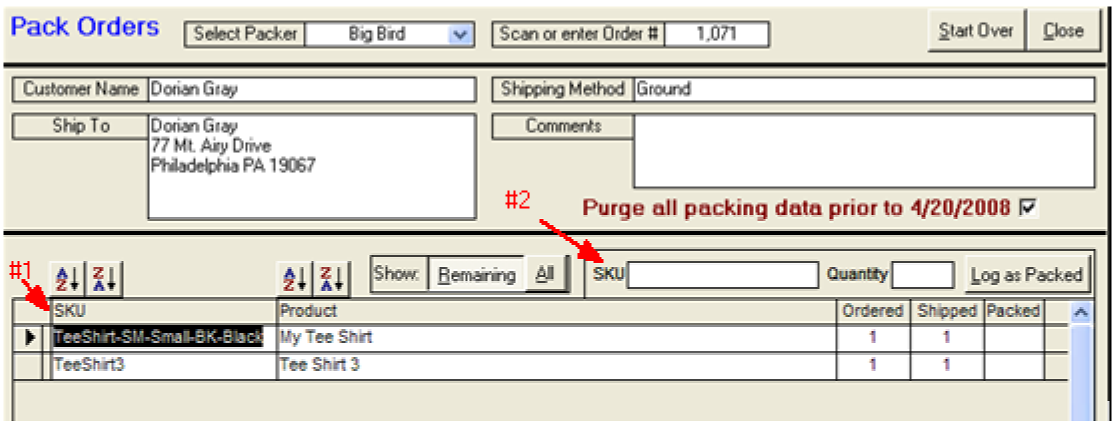
This option helps you eliminate packing errors. Complete the following steps to pack an order:

1. Go to **Main Menu > Ship My Orders > Pack My Orders**. The **Pack Orders** window appears.



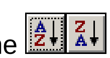
2. Select a **Packer** from the drop-down list. Packers are defined via List Maintenance. Refer to *List Maintenance,* in Chapter 2 for more information on adding packer's names to the list.

3. Scan a packing slip or manually type an order number into the **Scan or enter Order # field**. The form populates with the corresponding customer and order information:



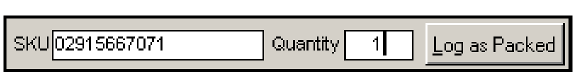
The **Customer Name**, **Shipping Method**, **Ship To** and **Comments** fields are not editable.

Purge all packing data prior to 4/20/2008 check box in the figure above relates to the number of days packing data is retained in the system. See system parameter, **PackingRetentionDays**. For performance purposes, it is best to keep this value to a low number.

4. Sort the products in the order by **SKU** or by **Product** by clicking the  buttons above the SKU (#1) or Product columns.

5. Next to the **Show:** label in the center of the form, click the **Remaining** or **All** buttons to specify which items are displayed. Selecting the **Remaining** button removes each item from the list as it is packed.

6. To manually mark an item as packed (without scanning its barcode), double-click in the **SKU** (#1) or **Product** fields of the item's row to enter that product into the SKU field (#2) and then type in the **Quantity** that is being packed:



7. Click the **Log as Packed** button. The program will consider the item as having been packed, as demonstrated by the increasing value in the **Packed** field. Repeat steps 6 and 7 for all items in the order. Skip to step 11.

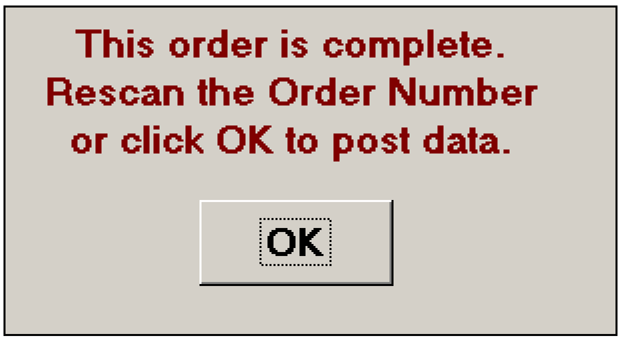
8. If using a barcode scanner, simply scan the barcode of each item as it is packed. If more than one of the same item is being packed, scan the barcode as many times as the quantity of the

item, or manually type in the quantity and click the **Log as Packed** button.

9. The system will alert the packer if an item that does not belong to the order is scanned.

10. If a mistake is made and it is necessary to start packing the current order over again, click the **Start Over** button. The program prompts the packer whether to **Clear all packing data for this order?** Choose **Yes** to remove all packing data recorded for this order and begin re-packing it. **No** retains the packing data already entered and allows the packer to continue where they left off.

11. When the last item in the order is marked as packed, a message box appears, asking the packer to post the packing data and close the order.



12. Click the **OK** button or **Re-scan** the order number barcode on the packing slip. To print order number barcodes on packing slips, set system parameter **ShowBarcodesOnPackingSlips**=TRUE.

Pack & Ship

If the program is configured to use **Pack & Ship** follow the instructions in this section for packing and shipping orders.

To configure the program to use Pack & Ship:

- Go to **Main Menu > Settings > Default Preferences > Ship My Orders > Pack & Ship**
- Set system parameter **Packing Form** to **Pack & Ship**

This screen helps to eliminate packing errors and provides the ability to print shipping labels.

There are many other system parameters which permit the customization of the **Pack & Ship** screen and the functions available there. Be sure to review the parameters in the Packing and Shipping groups and set them to match your business environment.

The Stone Edge Order Manager allows you to pack by **Order** or by **Item**.

- Packing by **Order** means scanning or entering an order number, packing the items, printing a shipping label and going on to the next order which is eligible to pack.
- Packing by **Item** means scanning or entering a SKU, viewing a list of unshipped orders which contain that SKU, and packing and shipping them. For example, if an item has been backordered for a while and the inventory is replenished, it is possible to produce a list of orders containing that SKU so they can be packed and shipped first.

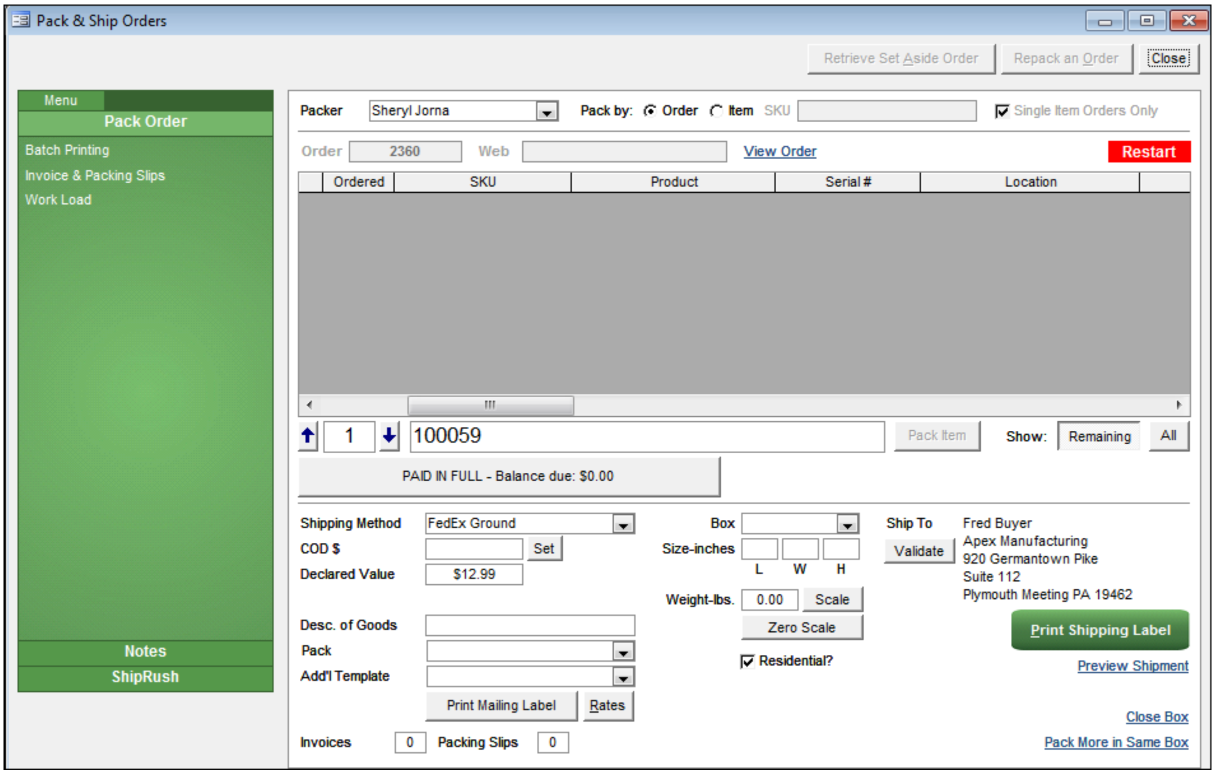
The **Pack & Ship** system streamlines the process of packing and shipping orders:

- Scan the order number of an invoice (sales receipt) or packing slip.

- Put an empty box on the scale.
- Scan each item as it is packed.
- Print a UPS, FedEx, or USPS label.
- Ship it!

Complete the following steps to **Pack & Ship** orders:

1. **Main Menu > Ship My Orders > Pack My Orders**



2. Select a **Packer** from the drop-down list. Refer to *List Maintenance,* in Chapter 2, for directions how to add packer's names to the list. If using The Stone Edge Order Manager's security system, it is possible to make the current user the default packer by setting system parameter **PackingSetToCurrentUser** to TRUE.

3. Select **Pack by Order** or **Item**.

   To **Pack by Order**:

   a. Type in an order number into the **Order #** field or scan the barcode of an order number from an invoice or packing slip. If the barcode scanner is configured properly, the cursor does *not* have to be in the Order # field when the barcode is scanned**.** Refer to the Knowledge Base for more information about configuring and using barcode scanners.

   ***Note**: To print barcodes on invoices and/or packing slips, see the system parameters, **ShowBarcodesOnInvoices** and **ShowBarcodesOnPackingSlips**.*

   b. If the selected order is available for packing, its information is filled-in automatically. If it cannot be packed for any reason (already packed, not approved), the program informs the packer.

   c. Go to step 4 and follow the remaining instructions.

   To **Pack by Item**:

   a. To pack orders that only contain a designated SKU, select the **Limit to Single Item**

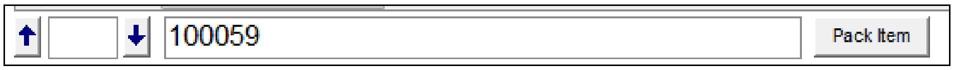
Orders check box. This box is not editable until the **Pack By: Item** radio button is selected. To pack any orders for the selected SKU, even if they also include other items, clear that box.

b. Scan the barcode of the selected SKU. If there are any open orders for that SKU, the program selects the oldest one, and its shipping and product information populates the form automatically.

c. Continue with the instructions in step 4. When finished packing the oldest order for the selected SKU, re-scan the item to retrieve the next oldest order for that SKU. Repeat this process until all orders for that SKU are packed.

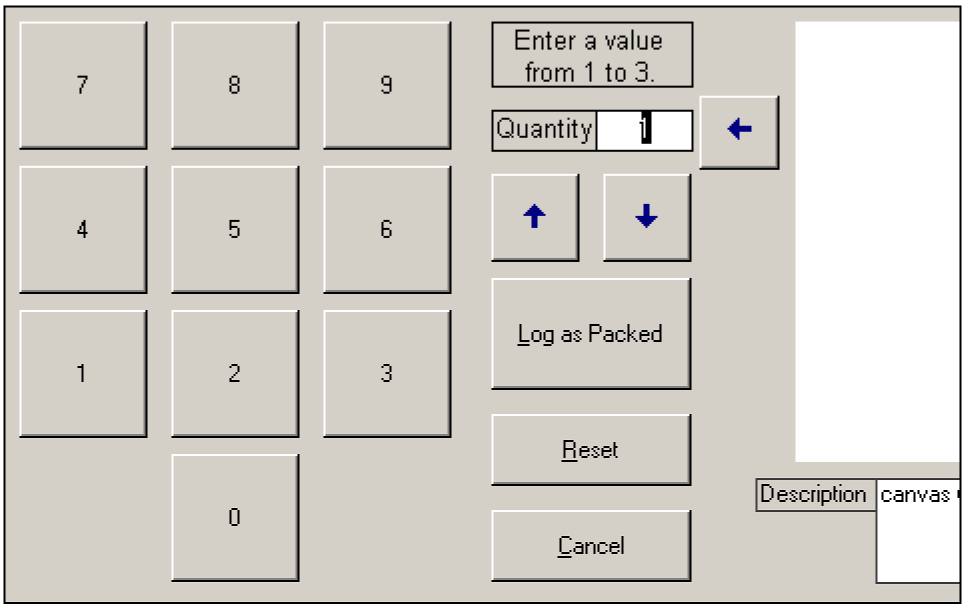
4. Log items as being packed. There are several ways to tell the program what item is being packed:

a. Type the SKU into the text field next to the **Pack Item** button. Enter the quantity in the field surrounded by the up and down arrows.



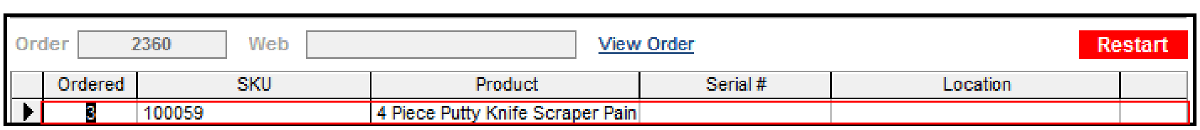
b. Scan the barcode of the item to be packed.

c. If method 4.a. or 4.b. is used and more than one of the same item was ordered, the program will prompt for the Quantity to log as packed:



Use the keypad, directional arrows or overtype the value in the **Quantity** field to indicate the number of that SKU that is being packed.

d. Double-click the row of the SKU or Product and enter the **Qty** to pack by overtyping the value or using the directional arrows:



The program alerts the packer if an item which does not belong to the current order is scanned.

5. Click the **Log as Packed** button.
6. When the last item on the order has been packed, the **Preview Shipment** and **Print Label** buttons are enabled. Click either of those buttons to open the appropriate shipping vendor's interface and review the shipping information used to process the shipping label. The appropriate vendor (UPS, FedEx, USPS, DHL) is determined by the order's shipping method. The **Preview Shipment** button allows you to review the values used to process the shipping label before it is printed.by the integrated shipping software. Refer to the Knowledge Base topics about printing labels with ShipRush.
7. When the shipping information is confirmed, print the label and affix it to the box that is now ready to be shipped.

Additional Pack & Ship Functions

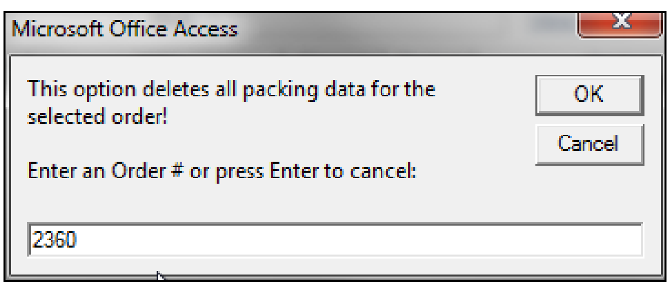
Repack an Order

Before an order is loaded into the Pack & Ship screen, you can elect to **Repack an Order**, if the system parameter **PackingAllowRepack** is set to TRUE.

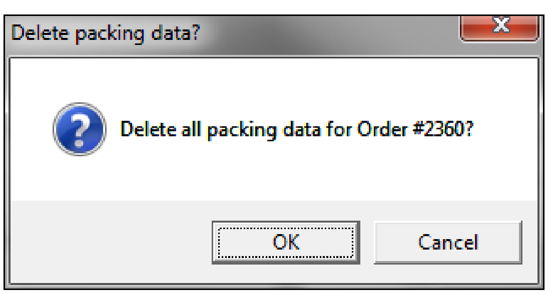
Repacking an order simply means that you are going to delete the existing packing data from the system and start the packing process over again**.**.

Complete the following steps to repack an order:

1. Open the **Pack & Ship** window.
2. Select a **Packer** from the drop-down box. If The Stone Edge Order Manager's security system is being used, set system parameter **PackingSetToCurrentUser** to TRUE to make the current Stone Edge Order Manager User ID the default packer.
3. Click the **Repack an Order** button.



4. Enter the **Order #** in the dialog box. Click **OK**.
5. The system prompts for confirmation before deleting all previous packing data for the order. Click **OK** to delete the existing packing data.



6. The Pack & Ship form is then populated with that order's customer and product information, and you can then begin to repack the order.

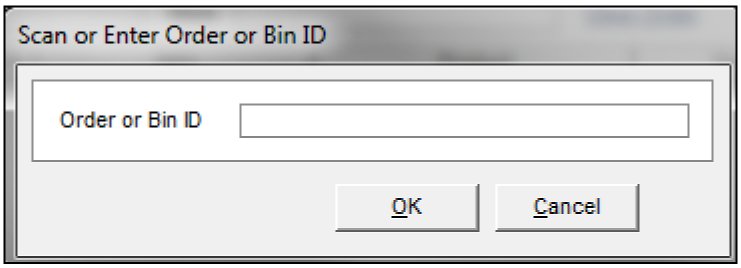
Retrieve Set Aside Order

Before an order is loaded into the Pack & Ship screen, you can elect to **Retrieve Set Aside order,** if system parameter **PackingAllowRepack** is TRUE.

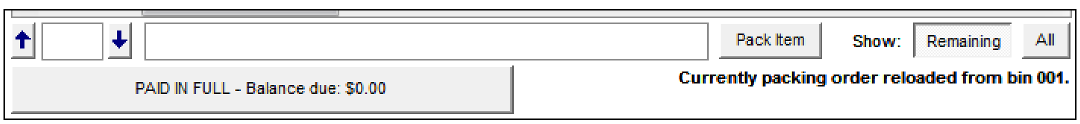
In the middle of packing a box, you might need to stop for some reason, so you choose the **Set Box Aside** link. When you are ready to finish packing it, use the **Retrieve Set Aside Order** button to reload the order data back into the Pack & Ship screen. Set aside boxes can be recalled by entering their order number or the Bin ID where the items are stored. Bin numbers are assigned arbitrarily by the merchant and are assigned when the box is set aside. The Stone Edge Order Manager temporarily records the Bin number until the order is completely packed.

Complete the following steps to retrieve an order:

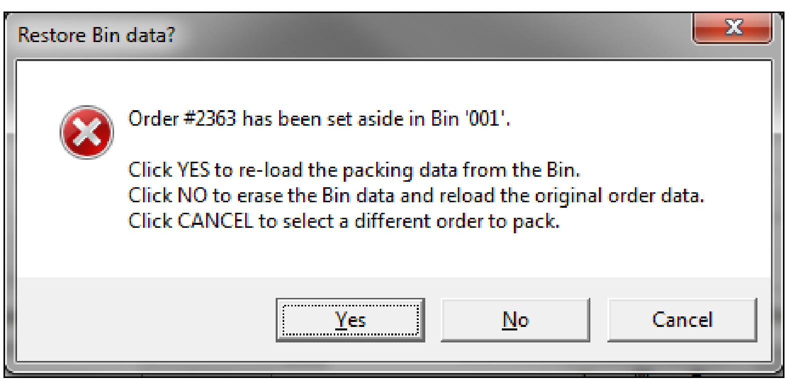
1. Open the Pack & Ship screen.
2. Click the **Retrieve Set Aside Order** button. The system displays the Scan or Enter Order or Bin ID dialog box:



3. Enter the **Order** or **Bin ID**.
4. Click **OK**. The requested order appears, and the packer can finish packing it.
5. The bottom right-hand corner of the screen shows the text "**Currently packing order reloaded from bin #.** or **(no bin #)**."



If the order number of a box that was set aside is entered into the **Order #** field instead of following the process outlined above, the program presents several options to proceed.



Pack Orders Tab

Packer

Select a user from the drop-down or set system parameter **PackingSetToCurrentUser**, if the Security System is enabled.

Pack By

Choose the method you want to use when packing orders: **Order** or **Item.** If **Item** is selected, the **SKU** and **Single Item Orders Only** fields become visible. Enter the SKU. It you want to pack orders which *only* contain that **SKU,** select that check box.

Order

You can manually type in a Stone Edge order number or scan the barcode of an invoice or packing slip to populate this field. Set system parameters ShowBarcodesOnInvoices and ShowBarcodesOnPackingSlips to TRUE to have barcodes printed on those reports**.**

Starting in 7.011, when a barcode scanner is used to pull up order information at this screen, the program first looks for a matching Stone Edge order number and loads that order's information; if a Stone Edge order number is not found, it then checks for any matching Web order numbers. If the program finds multiple Web order matches, it displays a list from which to choose.

Stone Edge itself does *not* provide the ability to print Web order barcodes on Invoices or Packing Slips.

Web

If your barcode system is setup to use web order numbers, this field contains the web order number of the order to pack.

View Order

This link is only visible if the system parameter **PackingAllowViewOrder** is set to TRUE.

Use this button to open the Process Orders screen and view the current order prior to packing it. Most of the functions of that screen are available. Once any items are marked as packed, this function is no longer available.

Click the **Close** button on the Process Orders form to return to the Pack & Ship screen.

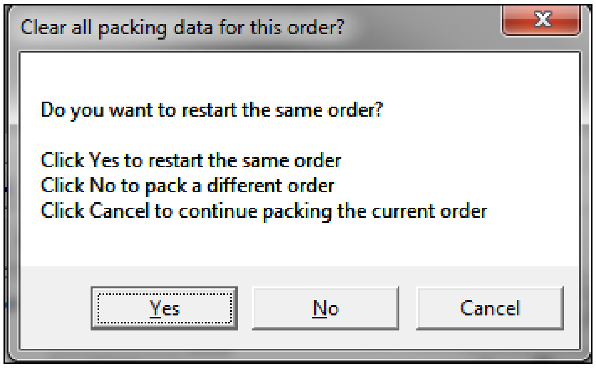
Gift Message

This link is only visible if there is a gift message associated with the current order and system parameter **PackLockGiftMessage** is FALSE. This parameter should also allow you to edit the gift message but it does not work in V7.0 - you can only view the message. The problem is fixed in later releases of the program.

Restart

This function clears the Pack & Ship screen and lets you to start over with the current order or different order.

Click the **Restart** button.

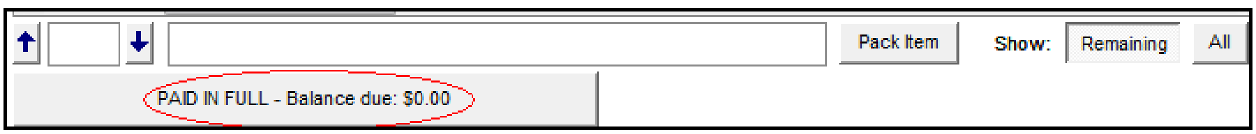


Choose: **Yes**, **No**, or **Cancel**.

Payment Options

You can collect payment for orders at the Pack & Ship screen if system parameter **PackingAllowChargeCard** and/or **PackingAllowCapture** are set to TRUE, and the payment method is a credit card.

Once an order is selected, the caption on this button changes to show Paid in Full or the Balance Due. If there is a balance due, click the button to process the payment for the current order.



Show: All or Remaining

Click **Remaining** or **All** to display items that still need to be packed, or all of the items in the current order.

Shipping Method

This field defaults to the shipping method for the current order, if one has been assigned. A different shipping method can be selected.

COD $

Click the **Set** button next to the **COD $** field to enter the COD amount for the order to its current balance due.

Declared Value

This is the value of the contents of the package for insurance or customs purposes. Refer to system parameters, **DazzleValuePercentage**, or **PackingValuePercentage** to control how the program determines this value.

Set the Ship Date to

Manually type in a date or click the **Calendar** button next to the **Set Ship Date To** field to select a ship date for the order.

Desc. of Goods

Enter a description of the goods included in the package. This is required for international shipments. See system parameter **DefaultDescriptionOfGoods**.

Pack

This field refers to a shipping carrier's package type and is only visible when using UPS integrated shipping software or ShipRush with FedEx or UPS. The choices vary between carriers. Select a package type from the drop-down list. Integrated FedEx shipping software users can specify the package type in the **Package Type** field on the FedEx form that appears when the **Preview Shipment** button is clicked.

Add'l Label Template

If you plan to print a mailing label for the current order, select the label format from the drop-down list before selecting **Print Mailing Label**.

Print Mailing Label

This button launches the appropriate shipping software screen for the shipping method assigned to the order so you can print a shipping label for the current order. Shipping labels may also be printed automatically when the last item in each order is packed, if the system parameter **PackingAutoShipWhenCloseBox** is set to TRUE.

Rates

Select this button to check shipping rates for any integrated shipping carriers which are configured.

Invoices & Packing Slips

These fields show the number of copies to print for each report type. Their default values are set by parameters **InvoiceCopies** and **PackingSlipCopies**.

Box

This field refers to an internal box definition within The Stone Edge Order Manager and does not correspond to any shipper's package type.

Select a box type from the drop-down list. The dimensions of the selected box populate the **Size-inches** fields. Otherwise, manually enter the package dimensions by typing them into the fields labeled L, W and H.

Weight-lbs

If no scale is used and if a published weight is specified on the inventory record of the item being packed, the weight field reflects that value. It is possible to manually overtype the value, if desired. Do not include the unit label, such as lb. or oz.
If a scale is used, the weight field remains blank until an object(s) is placed on the scale and the button is clicked. At that time the weight in pounds is displayed in the weight field. Refer to the Knowledge Base for more information about using an electronic scale with The Stone Edge Order Manager.

Scale

If The Stone Edge Order Manager is configured to use an electronic shipping scale, put the item on the scale and click the **Scale** button to see the **Weight-lbs.**

Click the **Zero Scale** button to clear the weight.

Set system parameter **PackingAutoReadScale** = TRUE to have the program automatically read the scale when the box is closed.

Note: *Please refer to the* ***Knowledge Base*** *for information on shipping scale setup.*

Residential?

This check box indicates if the package is being sent to a residential address as opposed to a business address.

Have shipper send email?

This field is only visible if ShipRush is the shipping system used. Check this box and ShipRush requests the carrier (FedEx, UPS or USPS) send an email to the customer.

Saturday Delivery

Check this box if a package is to be delivered on Saturday. Check with the shipper for service availability and cost.

Validate

Click the **Validate** button next to the **Ship To** address verify the shipping address for the current order. The address validation is performed by Endicia servers (USPS). The Stone Edge Order Manager displays a message box with the results of the inquiry. Addresses can be automatically validated upon import (web orders) by setting system parameter **VerifyAddesesAtImport** equal to TRUE.

Print Shipping Label

This button launches the appropriate shipping software screen associated with the shipping method of the order and allows you to print a shipping label. Shipping labels may also be printed automatically when the last item in each order is packed, if the system parameter **PackingAutoShipWhenCloseBox** is set to **True.**

Preview Shipment

This link opens the integrated shipping carrier's interface where you can review settings for the current order before printing the shipping label. Shipping labels can be printed directly from this form after you've confirmed the settings. This is especially helpful if you use the integrated UPS or FedEx shipping software. It allows you to override some default settings, such as signature confirmation required, which may not appear on the **Print Label** form.

Set Box Aside

Use the **Set Box Aside** option to stop packing the current order and save it for completion at a later time.

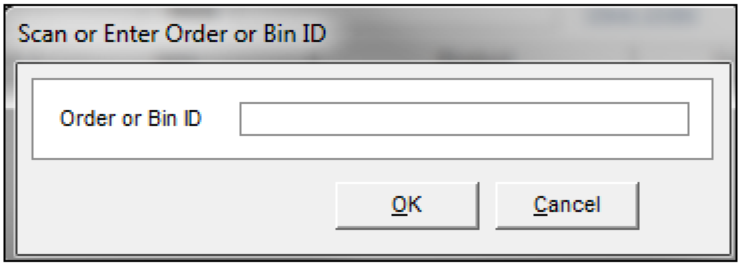
For example, if packing by SKU and an order also needs other items to be packed, the order can be set aside and finished later. Or, if packing by order number, it may become necessary to set an order aside because some items are not in stock.

The Stone Edge Order Manager allows you to assign a location, or Bin ID, to the order that is being set aside. Bins can have a barcode label associated with them to speed up the workflow. Bin numbers are assigned arbitrarily by the merchant and The Stone Edge Order Manager only keeps that data temporarily until the order has been completely packed.

To retrieve an order for completion, enter the order number or the Bin ID where the previously packed items are stored. Refer to the previous section entitled *Retrieve a Set Aside Order.*

Complete the following steps to set a box aside:

1. Click **Set Box Aside** button. The **Scan or Enter Bin ID** window appears:

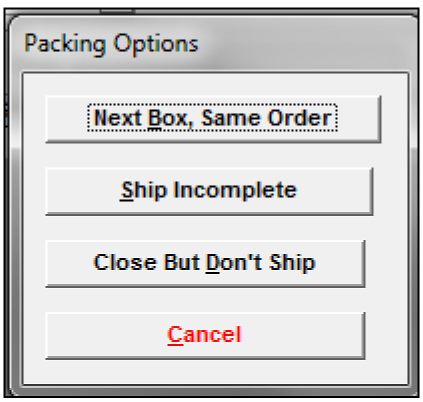


2. Scan or enter the **Bin ID** of the location where the partially-packed order is stored and click **Save**. If labeled storage bins are not used, click the **OK** button. The order number is then used to retrieve the order.

Close Box

It may become necessary to split one order into multiple boxes, or ship an order even though it is incomplete. Use this function button to close the current box, and tell the program what action to take:

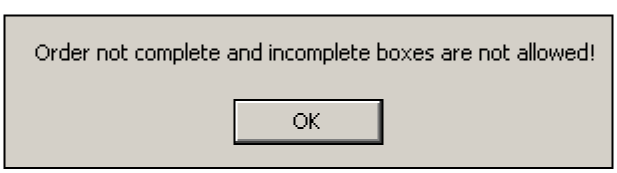
1. Click the **Close Box** link and make a selection:



   a. **Next Box, Same Order** prompts the packer to print a shipping label for the current box, and then continue packing the remaining items for the same order in another box and print another shipping label for the second box.

   Note: *The Stone Edge Order Manager's integrated shipping software does not support the printing of multi-box labels, e.g. box 1 of 3, box 2 of 3, etc., but it will print two separate shipping labels for the same order. To obtain multi-box discounts, use external shipping software such as UPS WorldShip or FedEx Ship Manager.*

   b. **Ship Incomplete** allows the packer to print a shipping label for the current order even though one or more items from that order are not yet packed. System parameter **PackingAllowShipIncomplete** must be set to TRUE to ship incomplete orders or the program displays the following message box:



   c. **Close But Don't Ship** allows the packing data to be posted without printing a shipping label for the order. The order must be completely packed to use this function. A shipping label for the order can be printed later at the Process Orders screen on the Shipping & Tracking tab.

   d. **Cancel** returns the packer to the current order without taking any action.

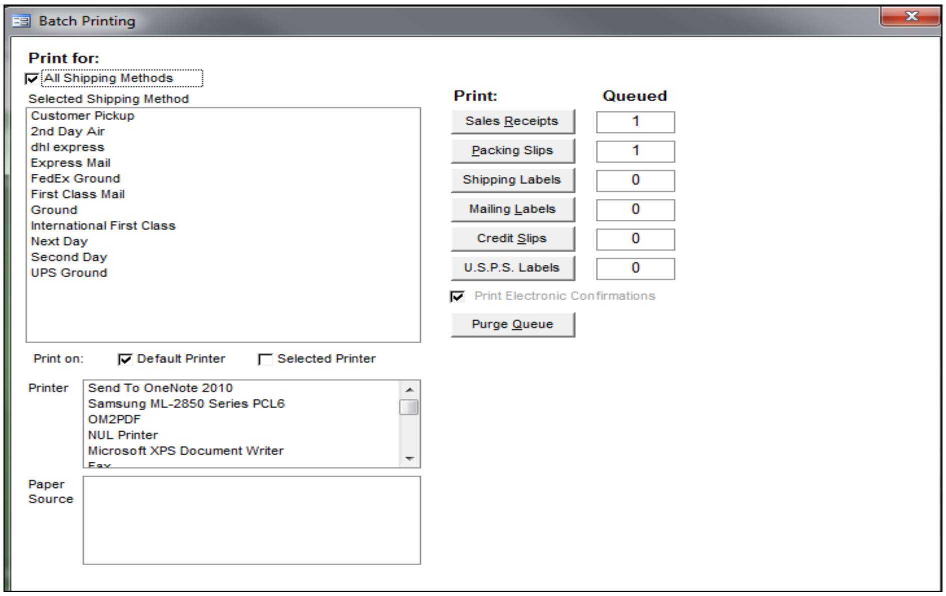
Pack More in Same Box

After all items are marked as packed, this link becomes visible. Select it to re-open a box and add more items.

Pack Order Accordion

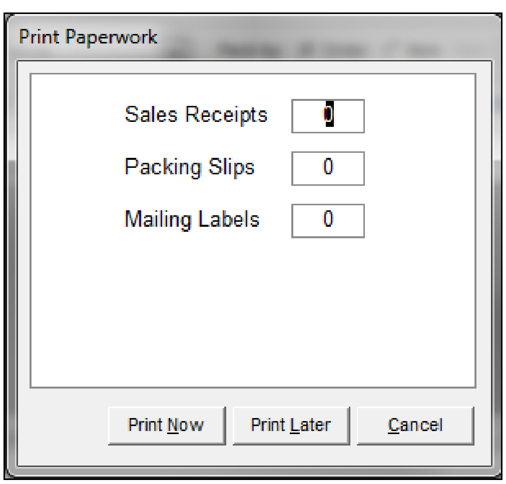
Batch Printing

This link opens the **Batch Printing** screen. Refer to ***Batch Printing***, in Chapter 10, for more information.



Invoice & Packing Slips

Click the **Invoices & Packing Slips** link on the **Pack and Ship** accordion to enter the number of Sales Receipts, Packing Slips, Mailing Labels, or Shipping Labels (not pictured) to print now or to add to the batch print queue. You must have an integrated shipping solution configured to print shipping labels:



***Note**: **Mailing Labels** are simple address labels, as opposed to **Shipping Labels**, have postage and are generated by specific carriers (UPS, FedEx, USPS, etc.).*

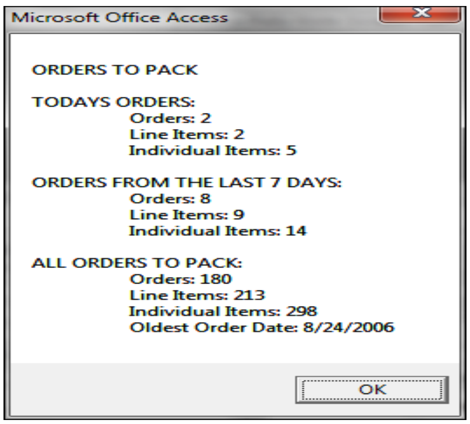
To have the Pack & Ship form pre-set to print the default number of Invoices and Packing Slips for each order, set system parameter **PackingPrintInvoices** to TRUE, otherwise those fields default to zero.

Workload

Click the **Workload** link on the **Pack and Ship** accordion to view statistics about the number of orders, line items, and individual orders which have been packed or need to be packed.

Complete the following steps to view the current workload:

1. Open the **Pack & Ship** screen.
2. Click the **Workload** link in the Pack & Ship accordion. The system displays the current workload:



3. Click **OK** to close the message box.

Notes Tab

This tab displays Notes, Tasks, or outgoing emails associated with the current order. **.** Refer to ***Checking Notes and Tasks***, in Chapter 2, for more information about using Notes and Tasks.

ShipRush Tab

***Note**: The **ShipRush** tab is only visible if ShipRush is used to print UPS, USPS, and/or FedEx shipping labels. (One of the *__ShippingSystem__ parameters is set to ShipRush)*

The **ShipRush** tab is where you can view or void recent shipments for FedEx, UPS and/or USPS (requires DAZzle license). End-of-Day reports can also be run here.

Select one of the links under the appropriate carrier's logo:

- **Recent Shipments** – Display recent FedEx, UPS and/or USPS shipments processed through ShipRush.
- **End-of-Day Process** –Closes a carrier's shipments for the day. Use the FedEx **End-of-Day Process** button for closing out FedEx <u>Ground</u> shipments. End-of-day processing is not required for FedEx <u>Express</u> shipments.

Quick Ship

Quick Ship is designed for merchants who want a quick way to print shipping labels for one or more orders, but do not want to confirm each item as it is packed. Use Quick Ship to build a list of orders, quickly weigh them (optional) and print their shipping labels.

To enable Quick Ship, set the **PackingAllowQuickShip** parameter to TRUE. The **Ship My Orders** link appears in the **Ship My Orders** tab and opens the **Quick Ship** screen.

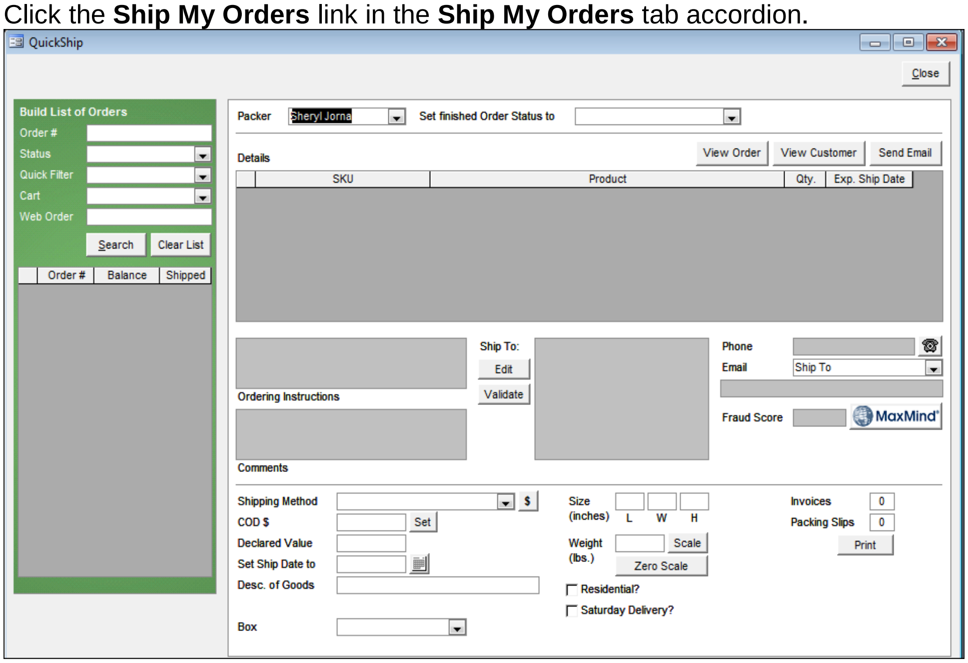
***Note**: There are many system parameters used to customize the **Quick Ship** screen and its functions. Review the parameters in the Packing and Shipping groups and set them according to the business needs. The Knowledge Base also provides additional information about using Quick Ship.*

Many of the fields on the Quick Ship screen are described in the previous section. In addition to those fields, the Quick Ship screen offers the ability to:

- Call the customer by clicking the button, next to the **Ship To:** address box.
- Select the Ship To: or Bill To: email address from the **Email** drop-down list and click the **Send Email** button.
- **Edit** the Ship To: address.
- View the customer's record and previous purchase information by clicking the **View Customer** button.
- Click the **View Order** button to open the order record.
- View the **MaxMind Fraud Score** associated with the order.
- View the **Ordering Instructions** or **Comments**.
- View shipping rates from configured shipping vendors by clicking the button, next to the Shipping Method drop-down.

Complete the following steps to ship orders using the Quick Ship interface:

1. Click the **Ship My Orders** link in the **Ship My Orders** tab accordion.



2. Select a **Packer** from the drop-down list. Refer to *List Maintenance,* in Chapter 2, for directions to add packer's names to the list. If using The Stone Edge Order Manager's security system, it is possible to make the current user the default packer. Set system parameter **PackingSetToCurrentUser** to TRUE.

3. <u>Optional:</u> Select an order status from the **Set finished Order Status to** drop-down list which is

applied to the order when it is shipped.

Warning! *Be careful that the status assigned to the order here does not conflict with any Status Events which are configured to send status update information to the Order Status system or shopping cart. If the status of the order does not change at the time the Status Event fires, the data is not sent to the Order Status System or shopping cart.*

4. **Build a List of Orders** using any combination of the filter options:
   a. Enter or scan an **Order #.**
   b. Use the **(Order) Status** or **Quick Filter** drop-down lists.
   c. Select a specific (**Shopping) Cart** and **Web Order (#)**.
   d. Perform an advanced search by clicking the **Search** button.

   The orders that match the criteria are listed.

   Note: *Multiple filters can be selected to make a list of orders that fit all of the criteria or you can clear the list of orders between filters.*

5. Select an order from the list to view its **Details**. An order can also be selected by scanning its barcode from an invoice or packing slip with a barcode scanner. Refer to the Knowledge Base for more information about using barcode scanners.
6. Place the ordered items in a box and place it on the electronic scale (optional).
7. Select a **Shipping Method** (if one is not already associated with the order).
8. Click the **Scale** button and then the **Print Label** button. Or, if a barcode scanner is configured, simply scan the order number from a packing slip or invoice again. The system gets the package's weight from the scale and prints the label.
9. Repeat steps 5 through 8 for some or all of the orders in the list. It is also possible to print **Invoices** and **Packing Slips** from this window by entering the desired number of each in the corresponding boxes and then clicking the **Print** button below them.

9 Managing Shipping

The Stone Edge Order Manager manages order shipment information by maintaining shipping rate calculations and provides the ability to recalculate shipping charges, as well as printing shipping labels for the major shipping carriers. This chapter is divided into the following sections:

Shipping Procedures

In-House

The steps that are normally followed when shipping an order are:

1. **Pack the Orders** – The Stone Edge Order Manager offers three options for shipping orders: Pack Only, Pack & Ship, and Quick Ship. Refer to the previous chapter for more detailed information about these different methodologies.
2. **Print Shipping Labels** – Shipping labels can be printed from within The Stone Edge Order Manager (Pack & Ship, Quick Ship, Process Orders), or by using an external program supplied by a carrier or another party. Refer to the previous chapter or the Knowledge Base for more detailed information about printing labels from these locations in the program.

   ***Note**: The Stone Edge Order Manager defines Shipping Labels as labels that are supplied by a shipping carrier such as UPS, or FedEx, etc. which include postage. Mailing Labels are defined as labels that do not include postage, just a name and address. The Stone Edge Order Manager can create either type of label, do not confuse the two.*

3. **Ship the Orders** – You must either arrange for a pickup by the shipping carrier or deliver the packages to a drop-off point or Post Office.
4. **Import Tracking Numbers** – It is necessary to have the shipping carrier's tracking numbers in The Stone Edge Order Manager in order to send the customer an email containing the shipping carrier's tracking number. How and when tracking information is stored in The Stone Edge Order Manager depends upon the type of shipping software that is used.

   If shipping labels are printed from within The Stone Edge Order Manager, the tracking information is immediately stored in the data file as shipping labels are printed.

   The most common carriers external shipping software (UPS, FedEx, USPS, and DHL) can be configured to send tracking data to The Stone Edge Order Manager by means of an ODBC connection with the store data file. You may be able to choose between manually sending tracking information from the external application at the end of the day or having it sent after the label has been printed. Refer to the *Knowledge Base* for information about creating ODBC connections for the various shipping carriers. Consult the external shipping software's documentation for additional details beyond what is contained in the Knowledge Base.

   Some shipping applications may only be able to provide you with a text file containing their tracking information which can be manually imported into The Stone Edge Order Manager's data file. Refer to the *Knowledge Base* article, *Import tracking Numbers (.csv or .txt)* for more information.
5. **Send Tracking Information Email to Customer** – The Stone Edge Order Manager can send an email to the customer which contains the shipping carrier's tracking number. Normally, a link is included that connects to the carrier's tracking website, allowing the customer to see the current shipment status for the order or item(s).

Outsourced Shipping (Fulfillment Centers or Drop-Shipping)

If you are not packing and shipping orders from your own warehouse inventory, but will use a Fulfillment Center to do so, refer to *Fulfillment Centers* in Chapter 7 for configuration information.

If you send orders to drop-ship vendors for Fulfillment, refer to other sections of this document and the *Knowledge Base* for more information about using Drop Shipping with The Stone Edge Order Manager.

Shipping Software

The Stone Edge Order Manager supports the use of all of the major shipping carriers, FedEx, UPS and USPS. For a complete table of the combinations of shippers and shipping software that can be used with The Stone Edge Order Manager, see the article, *Printing Shipping Labels* in the *Knowledge Base*.

Printing Shipping Labels with The Stone Edge Order Manager (Integrated Shipping Software)

As mentioned previously, The Stone Edge Order Manager offers several methods for printing shipping labels.

UPS Online Tools, ShipRush for FedEx, and Endicia DAZzle (USPS) can be used directly from within The Stone Edge Order Manager.

UPS Online Tools shipping software is built into The Stone Edge Order Manager (no additional software needs to be installed) and only needs minimal customization on the part of the merchant before they can utilize it to print shipping labels. A daily pickup account must be established with the carrier.

To print labels for USPS, you must purchase a license for Endicia DAZzle and install that software.

To print Fed/Ex shipping labels, you must get a license for ShipRush from Stone Edge Technologies and install that software.

The benefit of using one or all of these internal solutions is that tracking number information is immediately stored within The Stone Edge Order Manager as soon as the shipping label is printed.

The benefit of using ShipRush through Stone Edge is that it prints multi-box labels (Box 1 of 2, Box 2 of 2). The Stone Edge Order Manager can print a second shipping label for the same order; however, multiple box discounts offered by carriers will not apply.

Refer to the *Shipping* section of the *Knowledge Base* for more detailed information about the configuration and customization of a particular carrier’s shipping software.

Printing Shipping Labels "Outside" The Stone Edge Order Manager (External Shipping Software)

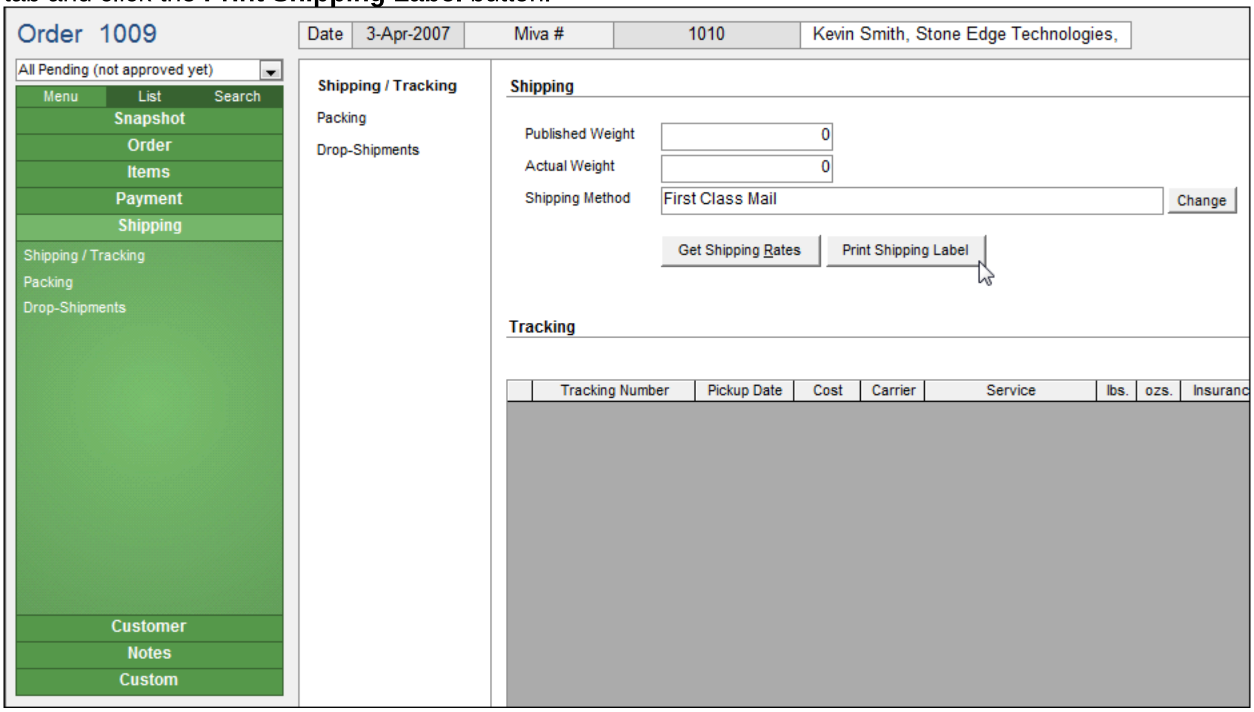
If an external shipping software package is used (UPS WorldShip, FedEx Ship Manager, DHL DB Connect, etc.) you must obtain a copy of the software and install it on your workstations. An ODBC connection must be created so that shipping application can pass information to The Stone Edge Order Manager’s data file. You must also perform some minor configuration tasks, such as mapping the appropriate fields between the applications. The external application can then get order information from Stone Edge without having to re-type it in the external shipping application. Tracking numbers may also be sent back to The Stone Edge Order Manager. Refer to the *Knowledge Base* for more detailed information about the configuration and customization of a particular carrier’s shipping software.

10 Managing Printing

This chapter discusses the ways The Stone Edge Order Manager can be configured to process paperwork such as invoices (receipts), packing slips, etc. This chapter contains the following sections:

Printing Paperwork for Individual Orders

It is possible to print sales receipts (customer invoices), packing slips, mailing labels and integrated shipping labels from the Process Orders screen. Simply locate the desired order, select the **Shipping** tab and click the **Print Shipping Label** button.



Batch Printing

Batch Printing allows you to print all of the approved invoices, packing slips, and shipping labels for a group of orders at the same time. Documents are added to the print queue by using the **Print Later** button when orders are approved or when manual orders are saved.

Documents can be selected for printing according to the specific shipping method used and/or by specific document type (sales receipts, packing slips, mailing labels, credit slips, or USPS labels). It is also possible to purge all jobs in the print queue. Refer to the ***Knowledge Base*** for more detailed information on Batch Printing.

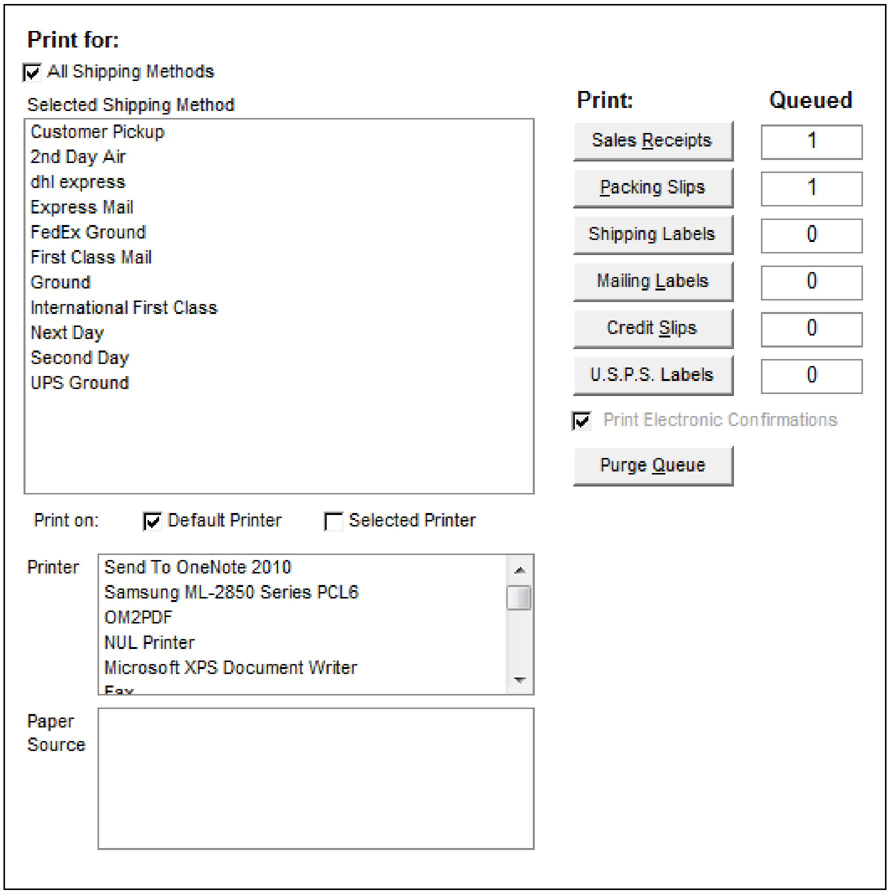
If The Stone Edge Order Manager is run in a networked environment, you can have all workstations use a common print queue by setting system parameter **UseCommonPrintQueue** to TRUE. Otherwise, each workstation uses its own unique print queue.

Likewise, if you have multiple Stone Edge Order Manager data files, each data file has its own batch print queue. Only the active data file's print queue is accessible to a given instance of The Stone Edge Order Manager at one time. Use the Switch Stores button on the Main Menu to change data files.

Complete the following steps to print paperwork from the active batch print queue:

1. Choose a **Selected Shipping Method** from the list to only print paperwork for orders that shipping method. You can also check the **All Shipping Methods** box to print paperwork for all shipping methods.
2. Optional: Choose a **Selected Printer** or leave it set to use the **Default Printer.**
3. Choose a **Paper Source** box.

4. Under **Print:,** click the appropriate button(s) for the types of documents to be printed (**Sales Receipts, Packing Slips, Mailing Labels, Credit Slips,** or **USPS Labels**).



***Note:** The total numbers of each category to print are displayed in the **Queued** column.*

Managing the Batch Print Queue

1. To delete **all** pending print jobs (documents types) from the batch queue, click the **Purge Queue** button on the **Batch Printing** window. The system prompts twice for confirmation before purging the entire batch print queue. Use this button with caution, as there is no easy way to recover the purged, un-printed reports. They cannot be retrieved by the Print Recovery feature since they have not yet been printed.
2. To delete a report which is sent to the printer, use the Windows Printers and Fax dialog box (Printer Properties).

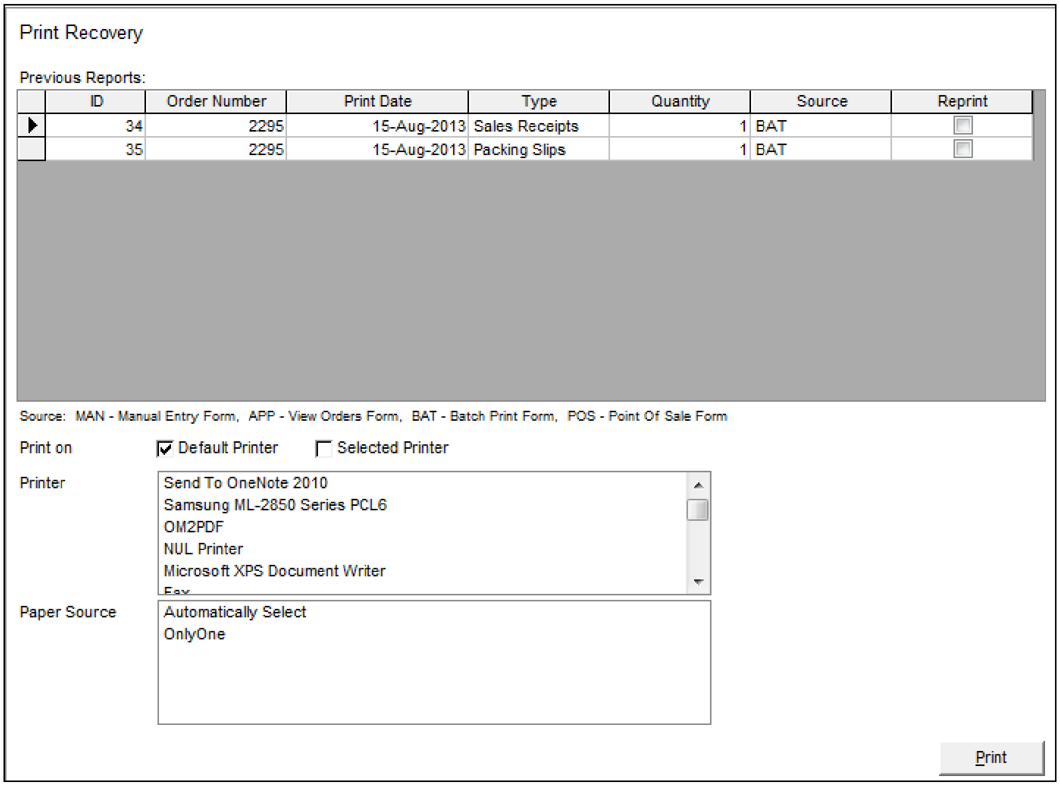
Print Recovery

The **Print Recovery** feature lets you recover reports in the event of a printing problem, such as running out of paper in the midst of a print job or a paper jam. If Print Recovery is turned on, whenever an invoice, packing slip, credit slip, or mailing label is printed, The Stone Edge Order Manager stores the report information (order number, date printed, the type of report, copies and the source of the print job) in a separate print queue. If necessary, you can re-print any of those documents.

The **Print Recovery** feature is controlled by two system parameters in the Reports group: **UsePrintRecovery**, which enables or disables the function; and **PrintRecoveryDays**, which defines how far back The Stone Edge Order Manager should keep records of print jobs. **UsePrintRecovery** is set to TRUE by default. **PrintRecoveryDays** is set to three days by default, but you can increase that if necessary.

Complete the following steps to recover a print job:

1. Navigate to **Main Menu > Settings > Report Functions > Print Recovery**. The system displays the **Print Recovery** window with a list of recently printed invoices, labels, credit slips, and packing slips:



2. Select the **Reprint** check box for the report to reprint.
3. To send the print job to the workstation's default printer, click the **Default Printer** check box. To use a different printer, click on a printer in the **Select a Printer** list box. Click on a paper source in the **Select a Paper Source** list box.
4. Click the **Print** button to send the print request to the designated printer. The **Reprint** check boxes are cleared after the report is re-printed.

11 Reporting

This chapter discusses the standard reporting capabilities of The Stone Edge Order Manager. This chapter contains the following sections:

The Stone Edge Order Manager Reports

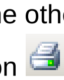
The Stone Edge Order Manager supports both standard and custom reports. Standard reports are those reports that are supplied with the program, such as **Charges and Credits**, **Packing Slips**, **Sales Receipts**, **Physical Inventory**, and **Sales by Product**. Custom reports can be either user-modified versions of standard reports (e.g. an invoice report customized for your company) or totally new reports created specifically for you either by Stone Edge Technologies, or a third party vendor at an additional cost.

Whether they are created either from scratch or by modifying any of the standard reports included with the program, custom reports must be saved in the Custom Reports database so that they are not lost when upgrading the program to a new version or if the program must be reinstalled on a given workstation.

Whenever a change is made to a custom report, it must be saved again in the Custom Reports database. Modified versions of the standard Stone Edge Order Manager reports **must** be saved with a different name (other than the default report name as it is supplied with the program). A good practice is to prefix/suffix the report name with the company initials for ease of identification.

The Stone Edge Order Manager's reports are Microsoft Access reports, and they can be created or edited using Microsoft Access database design features. Refer to the section entitled *Custom Report Maintenance,* in Chapter 2 or the ***Knowledge Base*** for more information about custom reports. User access to either type of report can be limited by use of The Stone Edge Order Manager's security system.

Previewing a Report

1. Complete the following steps to preview a report:
2. Go to **Main Menu > Run My Reports > Run My Management Reports**.
3. Select the report to preview from the list of **Standard Reports** or **Custom Reports**.
4. Click the **Preview** button.
5. Some reports prompt you to select which orders, customers, products, etc. to include in the Filter Options section of the screen. Fill in the requested information and click the **Preview** button.
6. The system displays the selected report.
7. Zoom in or out on the view of the report by clicking anywhere on the report. The navigation buttons at the bottom of the screen can also be used to view the other pages.
8. To print the report from the Preview screen, click the printer icon  on the Access toolbar at the top of the screen, or go to **File**> **Print** on the Menu Bar.
9. Click the **Close** button or the "X" button in the upper right-hand corner of the screen to close the preview.

Printing a Report

Complete the following steps to print a report:

1. Complete the following steps to preview a report:
2. Go to **Main Menu > Run My Reports > Run My Management Reports**.
3. Select the report from the list of **Standard Reports** or **Custom Reports**.
4. Click the **Print** button.
5. Some reports prompt you to select which orders, customers, products, etc. to include in the

Filter Options section of the screen. Fill in the requested information and click the **Print** button.

6. The report is sent to the printer. If system parameter **UsePrinterMenu** is set to TRUE, you have the opportunity to choose a printer, otherwise, it goes to the default printer for the workstation.

Report System Parameters

The Stone Edge Order Manager makes use of system parameters to control the format of certain standard reports, as well as the ability to select whether certain field values are contained in those reports, without having to create a custom report.

To view the entire list of system parameters in the Report group, do one of the following:

- Go to **Main Menu > Settings > System Functions >Set System Parameters**
- Go to **Main Menu > Quick Clicks > System Parameters**
- Or refer to the online Knowledge Base for a list of all of the parameters in this group and what they control, as well as any dependencies on other system parameters.

For more information on setting system parameters, see the section entitled *Setting System Parameters,* found in Chapter 2 of this document, or refer to the Knowledge Base article.

Showing Selected Field Data on a Report

Certain fields can be chosen for display on select reports without the need to create a custom report. For instance, you may choose whether to show a customer's Bill To: email address on their invoices or packing slips by setting system parameters **ShowBillToEmailOnInvoices** and **ShowBillToEmailOnPackingSlips**.

Changing a Field Label on a Report

Some fields of a report can be relabeled to suit your needs without the need for creating a custom report. For example, you may choose to label the field that contains The Stone Edge Order Manager's order number to a value other than the default setting ("Ref# No.") on sales receipts and packing slips by setting system parameter **InvoiceOrderNumberLabel** to "Invoice". The same can be done for the heading of an Invoice (Sales Receipt), Quote and the Quote number field.

Inserting a Company Logo on Reports

To insert a company logo on Invoices (Sales Receipts) and Packing Slips, use the system parameter **ReportLogoLocation** to tell the program the location of the image file to be used. Commonly used image file types such as .bmp, .gif or .jpeg are acceptable. Resize the image to 1X1 before setting the system parameter.

Communiqué

The Stone Edge Order Manager contains the *lite* version Communiqué, a reporting package from Altaireon. The lite version includes 25 fully functional reports as well as a dashboard feature. The reports available at no extra cost include customer, sales, returns and supplier data. Please see the online Knowledge Base for a full list of the free reports.

If a user chooses to purchase the full version of Communiqué, The Stone Edge Order Manager detects the full version is installed and the additional reporting capability of the full version is available.

All technical support for Communiqué reports or the dashboard feature (*lite* or full version) is supported by Altaireon. They can be contacted at www.altaireon.com/tech_support.html.

Related System Parameters

There are two system parameters associated with Communiqué. They are **CommuniquéLocation**, which indicates the location of installation of the full version of Communique, and **UseCommuniqué**, which determines if Communiqué appears in the list of Report options on the Main Menu. The use of Communiqué can also be restricted by The Stone Edge Order Manager’s security system.

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