

SAMPLE ORDERS
PROCESSING FOR EXISTING / NON-JASON CUSTOMER

NOTE:

As of the start date for using the above method for entering samples, the reason code of “sample” will be removed from ITE. You will no longer have to enter ITE’s for sample type orders. By billing the sample orders with an “IN” transaction type, inventory will automatically be deducted from your branch. Also if your branch doesn’t have the proper inventory levels to send out the sample, **DO NOT create a “Transfer Order” for another branch, call the branch that has the inventory and ask them to ship the sample if it must be sent right away.**

There are (2) ways to process “SAMPLE” type shipments when using Order Entry. We can process sample orders for an existing Jason customer (CM) record on file, or we are sending sample merchandise to a “prospect” or non-Jason customer. An example of how we should process both types of sample orders is contained in this document. Please review to be sure that each user that can enter “Sample” type orders follows these steps.

Order Entry for Existing Jason Customer:

- ADD “OR” transaction type using “ORDER”
- Override the following “header” fields before entering any detail lines.
 - Field 15 (Customer PO No.) = “SAMPLE”
 - Field 56 (Freight Payment) = “PPD”
 - Field 69 (Cst Typ: = “SAMP”
 - Field 80 (Acct Gp) = “SAMPLE”

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C:\Program Files\Century\TinyTERM\New Jason.tpx - TinyTERM
File Edit View Tools Session Help
SHIPPED ORDER INQUIRY (SQ)
DATE : 09/10/2003 TYPE: IN CUST ID: 1-NEW114 NEWARK PULLEY CO.
ORDER: 1-383770 SHIP TO: SAME NEWARK PULLEY CO.
REF #: 1-383770

35 PO Date: 51 Div : 1 67 Branch : 1 83 Cus Back: Y
36 Reqd Dt: 09/11/2003 52 Sls 1 : 1001 68 Sell Br: 1 84 Comments: N
37 Cancel : 53 Terr : 1 69 Cst Typ: SAMP 85 Confirm : N
38 Promsd : 54 Uia : 13 70 Dept : 1 86 On Hold : N
39 Entered: 09/10/2003 55 FOB : P 71 87 Hld Reas:
40 Ship Dt: 09/10/2003 56 Frt Pnt: PPD 72 Route : 88 Is a B/O: N
41 Picker : 57 Lock Bx: 73 Stop : 89 Priority: 5
42 58 Terns : 01 74 SA CatA: PT 90 Ord Rule: 0
43 59 75 SA CatB: 3 91 Free Frt: 0
44 60 76 SA CatC: 002 92 Ord Type:
45 61 77 SA CatD: 93 POS Cust: 0
46 62 78 SIC Cd : 5200 94 Reprice :
47 Ordered: 09/10/2003 63 79 To Brch: 95 Subst Cd: 2
48 Order #: 1-383770 64 80 Acct Gp: SAMPLE 96 Bill Mth: 0
49 # Ship : 0 65 81 97 PO Reqd : Y
50 66 82 98

-----Screen 2-----
Enter (O)ptions, (C)omments, C(I)SI, C(S), AR(Q)

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Enter All Line Items, for each item entered:

Change Field (9) Sell Price = "0"

Order Entry for Non-Existing Jason Customer:

There will (5) "SAMPLE" customers setup in CM, they will be "ZZ-SAMPNJ, ZZ-SAMP TX, ZZ-SAMPIL, ZZ-SAMP CA and SAMPFL". Depending on your branch location, you will enter the appropriate "SAMPLEXX" customer into Order Entry. The "SAMPLE" customer will all have "blank" name and address fields. For each order processed under the "SAMPLE" customers, each user will be prompted for name and address information fields. These fields must be entered so we can ship the order via "UPS".

- ADD "OR" transaction type using "ORDER"
 - Enter "ZZ-SAMPXX" customer (XX = branch) at customer prompt.
 - Field 15 (Customer PO No.) = "SAMPLE"
 - Field 19 (Name) Customer/Prospect Name
 - Field 20 (Address line 1)
 - Field 21(Address line 2)
 - Field 22 (Address line 3) If needed
 - Field 23 (City)
 - Field 24 (State)
 - Field 25 (ZIP)
 - Field 26 (Country) If needed
 - Field 31 (Remarks) If needed
 - Field 54 (Ship Via)
 - Field 56 (Freight Payment) = "PPD"
 - Field 153 (Memo Field 1) If needed.

Sample Customer Header Screen (s):

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C:\Program Files\Century\TinyTERM\New Jason.tpx - TinyTERM
File Edit View Tools Session Help
(C)Add ... ORDER ENTRY ORDER
DATE : 09/10/2003 TYPE: OR CUST ID: SAMPLE5
SHIP TO: SAME JIM MESSINEO
ORDER: 1-383776

01 Cust ID: SAMPLE5 18 Shipto: SAME
02 Name : 19 Name : JIM MESSINEO
03 Addr 1 : 20 Addr 1: 340 KAPLAN DRIVE
04 Addr 2 : 21 Addr 2:
05 Addr 3 : 22 Addr 3:
06 City : 23 City : FAIRFIELD
07 State : 08 Postal: 24 State : NJ 25 Postal: 07004
09 Country: 26 Cntry :
10 Attn : 27 Attn :
11 Xref : 28 .... :
12 ... 29 .... :
13 Phone : 30 .... :
14 Fax : 31 Remark:
15 PO No. : SAMPLE 32 Mk For:
16 Resale#: 33
17 34

-----Screen 1-----
Header (O)ptions: _
    
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C:\Program Files\Century\TinyTERM\New Jason.tpx - TinyTERM
File Edit View Tools Session Help
(C)Add ... ORDER ENTRY ORDER
DATE : 09/10/2003 TYPE: OR CUST ID: SAMPLE5
SHIP TO: SAME JIM MESSINEO
ORDER: 1-383776

35 PO Date: 51 Div : 1 67 Branch : 1 83 Cus Back: Y
36 Reqd Dt: 09/11/2003 52 Sls 1 : 1019 68 Sell Br: 1 84 Comments: N
37 Cancel : 53 Terr : 1 69 Cst Typ: SAMP 85 Confirm : N
38 PronsD : 54 Uia : 01 70 Dept : 1 86 On Hold : N
39 Entered: 09/10/2003 55 FOB : NJ 71 87 Hld Reas:
40 Ship Dt: 56 Frt Pnt: PPD 72 Route : 88 Is a B/O: N
41 Picker : 57 Lock Bx: 73 Stop : 89 Priority: 5
42 58 Terns : 01 74 SA CatA: UNC 90 Ord Rule:
43 59 75 SA CatB: UNC 91 Free Frt: 0
44 60 76 SA CatC: UNC 92 Ord Type:
45 61 77 SA CatD: 93 POS Cust: 0
46 62 78 SIC Cd : 5200 94 Reprice :
47 Ordered: 09/10/2003 63 79 To Brch: 95 Subst Cd: 2
48 Order #: 1-383776 64 80 Acct Gp: SAMPLE 96 Bill Mth: 0
49 # Ship : 0 65 81 97 PO Reqd : Y
50 66 82 98

-----Screen 2-----
Header (O)ptions:
    
```

Enter All Line Items, for each item entered:

Change Field (9) Sell Price = "0"