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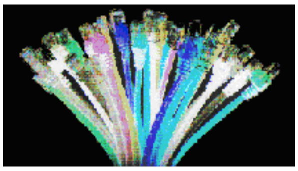


Blue-Logic

Stock Control & Order Processing Software Solution

USER GUIDE

2008

Stock Control & Order Processing Software Solution

CONTENTS

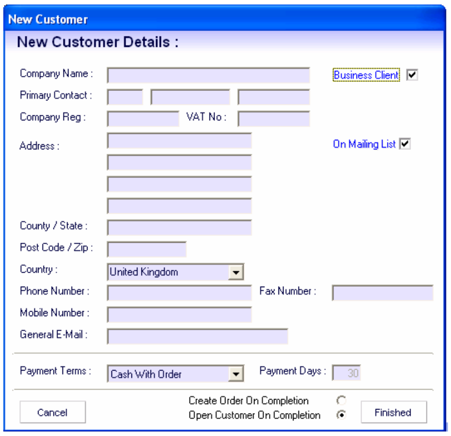
How to create a customer

1. Click on **Customer Details** on the left of your screen.

2. Click on the icon situated at the top of your screen: **New Customer** this will bring up a smaller window where you can type in all the details.

3. When you have entered all the details, you can choose to either create an order on completion, or open the customer details, by ticking the either of the two boxes.

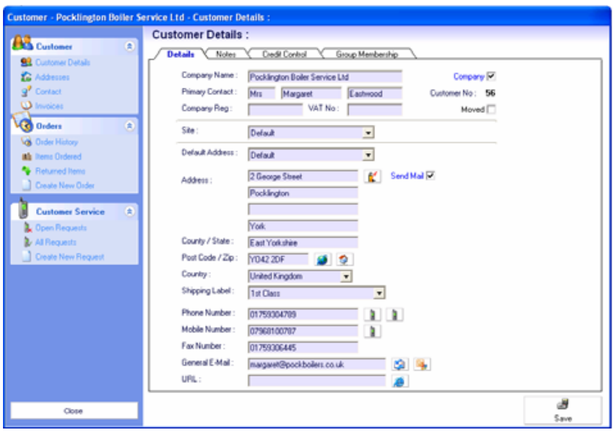
4. Before exiting this screen make you sure you have ticked the business client box (if applicable) as this depicts how the customer is shown, either as a business client or as a home customer. Click **Finished**.



How to edit customer details

1. To edit customer details open the customer you want to edit by double clicking the customer.

2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save to keep the amendments.



Note: Customers can be put into groups, e.g. Wedding Supplies, this is very useful when targeting mailshots. Click on the **Group Membership** tab and either select or add a new group to the list.

How to use the customer search function

The search function is very useful when you are trying to locate an existing customer. With customers you have two search options, either **Search** or **Advanced Search**.

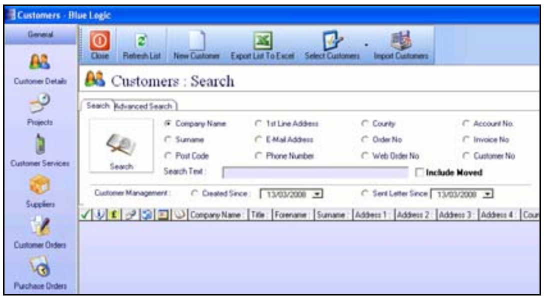
Search

1. Go into the customer details screen, click on the **Search** tab.

2. Choose if you want to search for the **Company Name** etc, by ticking the relevant boxes. Type in the information you have for the company name e.g. “int” for “International Services”.

3. Click on the **Search** button and the results will show company names with “int” in the title.

4. Click on the company name for example and the details screen will appear for that customer.



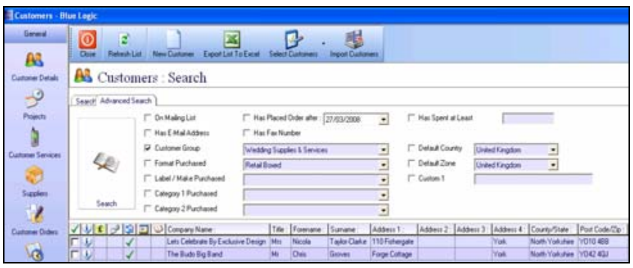
Advanced Search

1. Go into the customer details screen, click on the **Advanced Search** tab.

2. Choose if you want to search for customers who are in a **Customer Group** etc, by ticking the relevant boxes. When you have ticked on the relevant box, choose which **Customer Group** you wish to search for, e.g. Weddings Supplies & Services.

3. Click on the **Search** button and the results will show the customers in that particular group.

4. Click on the customer you want and the details screen will appear for that customer.



Customer details screen step-by-step

1. Select **customer details** icon on the main screen, search for the customer (or create new) then choose **contact** icon on the left of the screen. This brings up another screen, which allows you to create and store letters, record telephone calls etc.

2. At the bottom of the screen there are five icons, which allow you to create either :-

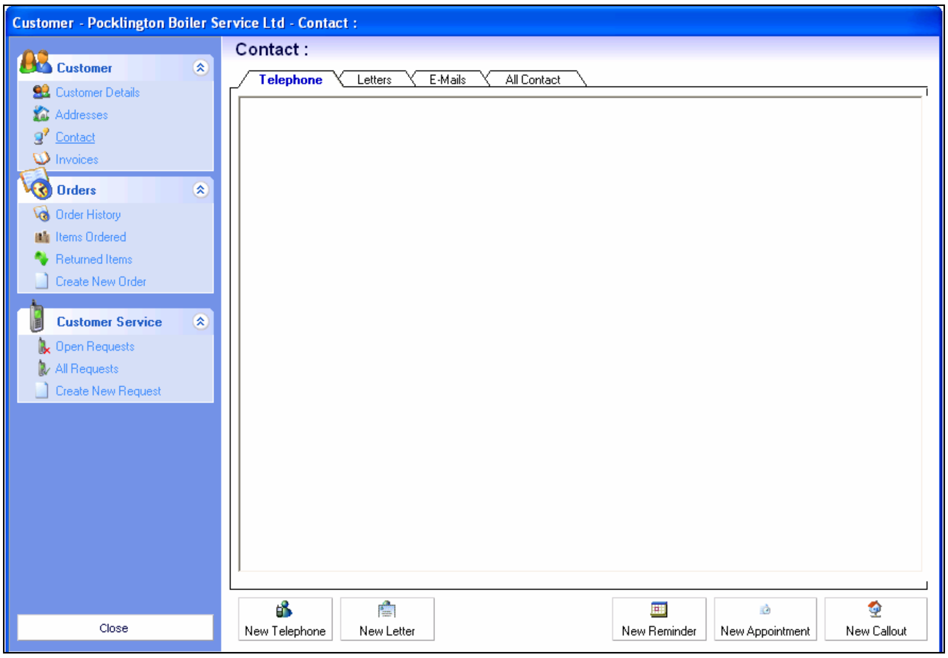
   - **New Telephone** - this is a small box for recording telephone calls etc, it also appears automatically when tapi is activated.

   - **New Letter** - this allows you to create letters using templates to populate names, addresses etc. Choose the **Document Template** from the drop down list, then just merge this to your document. There are several options you can use to generate your letter, e.g. print, email, fax.

   - **New Reminder** – this allows you to set sales calls reminders etc.

   - **New Appointment** – please see the “How to create an appointment”.

   - **New Callout** – please see the “How to create a callout”.

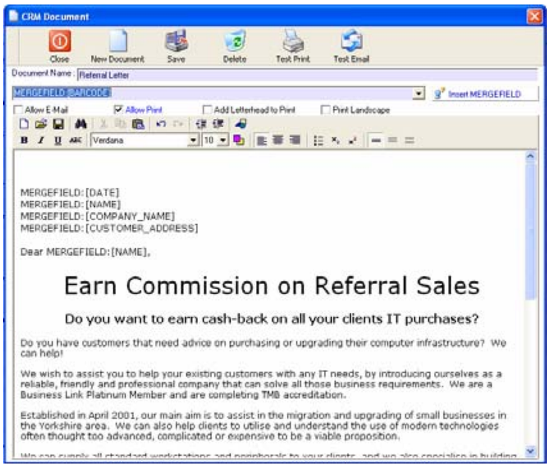


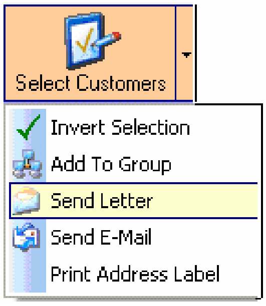
How to create a CRM document

1. To create a letter template, click on **Groups/Setup** on the left of your screen, and then click on **CRM Documents**.

2. Click on **New Document** and you can either type in the white area and then save the document, or insert the mergefields required, e.g. customer name and address, and then write the content of the letter.

3. Save as draft and test print the letter before clicking on send. Letters can be e-mailed, faxed or printed out.





How to send out marketing material

1. To send a printed mailshot to several customers, go into the **Customer Details** screen and select the customers by ticking them.

2. Click on the **Select Customers** drop down menu at the top of your screen, highlight and click on **Send Letter to Selected**, this brings up the **CRM Document** window where you select a template letter. The customer details will then be populated with the correct mergefield data and then the letters can be printed out.

3. To send an e-mail mailshot to several customers, the procedure is the same as above, but highlight and click **Send E-mail** in the drop down menu and select the **CRM Document** you want to send, click ok and the clients details will be populated into the mergefields specified.

Note:

You can also create a group of customers to send specific mailshots to, go into the **Customer Details** screen, click on the **Select Customers** drop down menu, then **Add to Group** this will add all of the selected to a group already created.

How to take a telephone order

1. Answer call.

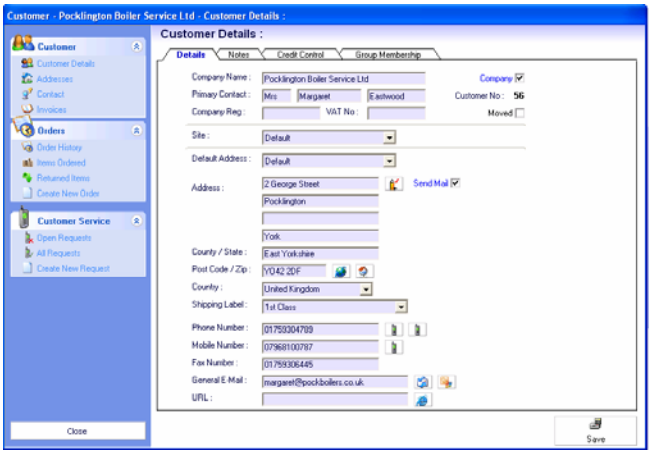
2. If tapi function is activated the customer details screen will appear. If tapi is not activated, click on **customer details** on the main screen and search for their name. If they are a new customer click on **customer** details on the main screen, then **add new customer**.

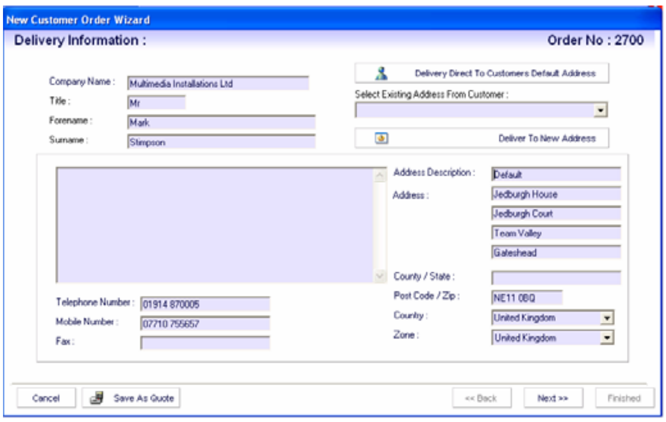
3. Double click on the correct customer, which will bring up the **customer details** screen.

4. If they are a new customer click on **customer** details on the main screen, then **add new customer** (at the top of your screen) this brings up a blank details screen. Fill in all the boxes then either click on :-

   - **Open Customer on Completion**. This will allow you to create a callout or an appointment by opening the customer details screen, and then select the contact icon on the left of the screen.

   - **Open Order on Completion**. This will allow you to create an order for a product, this option should be used for price enquiries of products, all orders can also be saved as quotations here.





Please note: The full instructions on how to take an order are under “How to create an order” found on page 7 of this User Guide.

How to create an order

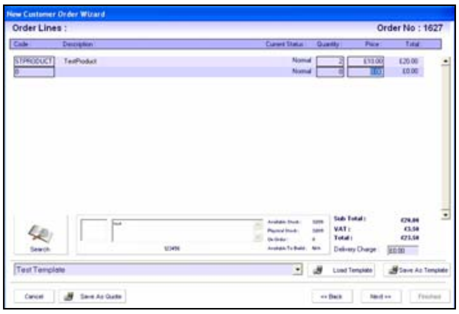
1. To create an order or to enquire about a product or price, click on the **Customer Details** icon on the left of your screen and search for your customer.

2. Choose **Orders** from the icons on the left. This brings up another window that shows all the order history/status for that customer, and also allows you to **Create New Order**.

3. Click on the icon at the bottom of the screen.

4. Another window appears called **New Customer Order Wizard**, which takes you through the ordering process and allows delivery information to be changed as required, or a default address if no change.

5. Click next to bring you to the **Order Lines** screen.

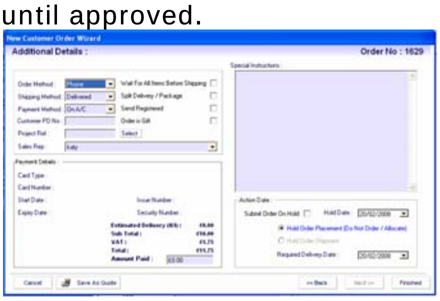


6. The product code is entered here, or click search to bring up the **Products Search** screen, which allows you to find products using keywords. Template orders can be used at this point just select from the drop down list and load. You can create new templates from this screen as well as loading ones already made.

7. Click next to enter any additional details. **NOTE** – Payment method drop down menu must be set to **On Account** if you do not wish to take a payment immediately.

8. Click finish to finish the order and create picking lists and purchase orders for stock if necessary.

9. Alternatively you can just save the order as a quote by clicking **Save as Quote** icon at the bottom of any of the three screens in the Wizard at any time. This can be used for any enquiries or product price checks that a customer has called about. It can be recalled at any time and an order will not be processed until approved.



How to create an appointment/callout

New Appointment

This option is used to create an on site meeting but does not charge time etc.

1. Clicking on the **New Appointment** icon takes you straight into the diary, which brings up a list of employees.

2. You can choose an employee and date, then click and stretch the box to fit the time you wish to allocate. (This option is used for non chargeable meetings/appointments only).

3. Another screen will then appear called **new schedule event** where you can enter details of the appointment.

4. Click finish to complete the appointment.

New Callout

This option is used for creating jobs and job sheets etc, where time can be charged.

1. Clicking on the **New Callout** icon takes you straight to the diary page, but shows only the employees that are set up in **Employee Configuration** as able to do callouts.

2. You just choose an employee and date then click and stretch the box to fit the time you wish to allocate.

3. Another screen will appear then called **new schedule event** this allows you to enter details of the job and the time charge to be used on this job. **(Note – you cannot finish this screen unless you have completed the above two tasks)**

4. You can also pick a **serviced item** from the list of ones at this address, and also pick the default address or another address from the drop down menu. **(Note – you must have previously added all the serviced items at this address and all customer addresses in the Customer Details addresses screen).**

5. These details will then appear on the job sheet for the employee to see.

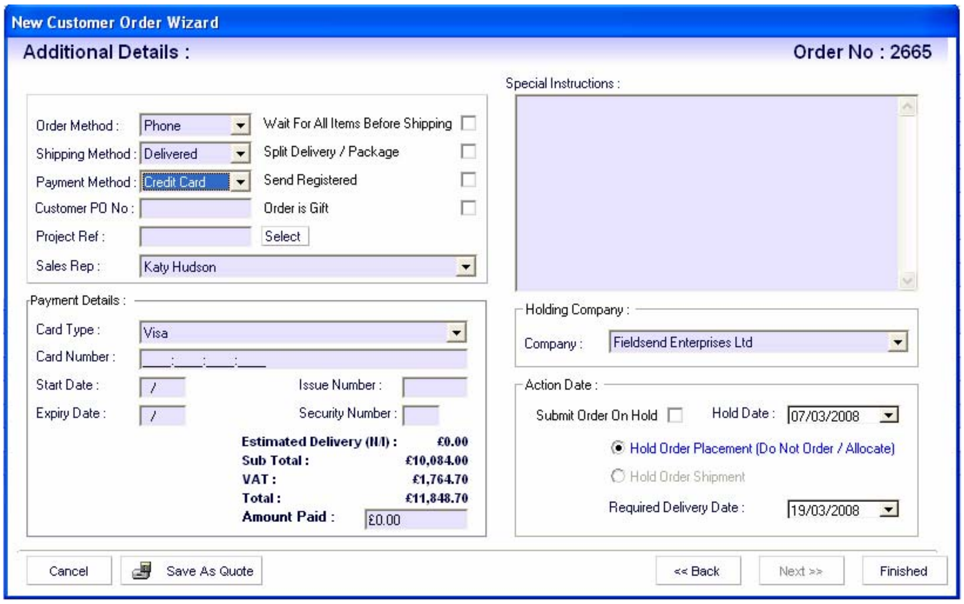
6. Click finish to complete the callout.

How to take a credit card payment

1. When the customer wants to pay for an order by credit card, go into the order and on the **Additional Details** screen, choose Credit Card in the drop down Payment Method menu.

2. Fill in the credit card details in the Payment Details box.

3. Click Finish, the payment will be taken instantly from the customer's card.

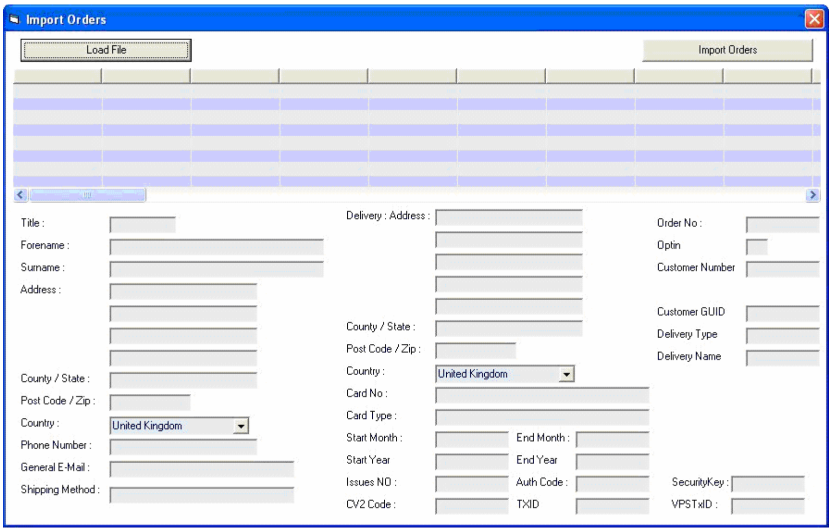


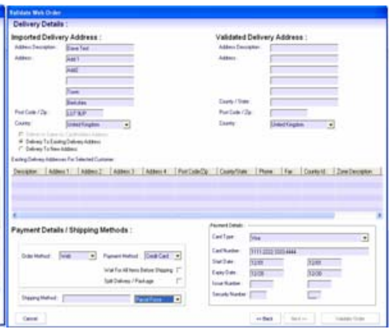
How to import/validate a web order

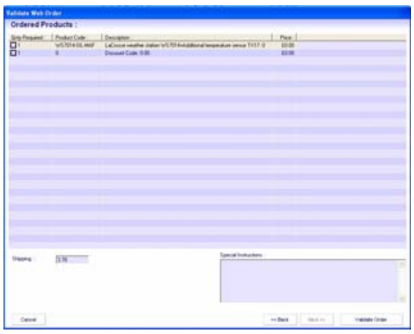
1. Go into the **Customer Orders** icon on the left of your screen. Then click on the **Import Web Orders** button at the top of the menu. This brings up the validation screen.

2. Click on the **Load File** button on the left of your screen. This brings up all Web Orders to enable you to validate them.

3. When you have finished the validation process just press **Import Orders**.







When you click **Import Orders** it takes you through a Wizard to **Validate Web Order**.

Follow the instructions on the 3 screens, when you come to the 3rd screen and everything is correctly entered click **Validate Order**.

How to ship delivered orders

1. Go into the **Picking Lists** icon on the left of the main screen.

2. If the customer has paid by credit card tick **Awaiting Picking / Order Completed**. Click on the order you want to ship and click **Release for Picking**. Tick **Awaiting Payment Confirmation** then follow steps 4 – 7.

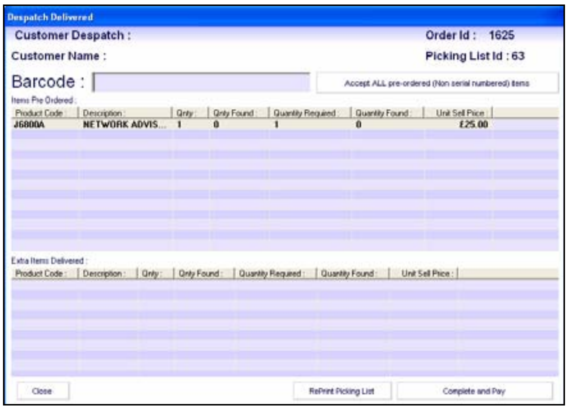
3. If the customer has paid by cheque or on account tick **Ship Account Order**. Click on the order you want to ship and a screen will appear called **Despatch Delivered** then follow steps 4 – 7.

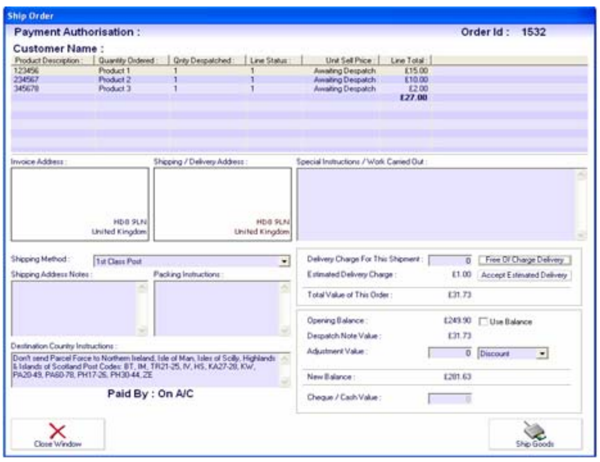
4. You can either scan with your scanning tools, the barcodes of the items you are sending, or you can type the product codes in. If a product code is not found you can also search for the product using the search wizard keywords etc.

5. When you have finished click **Complete and Pay** at the bottom of the screen, this brings you to the next window called **Ship Order**. This screen allows you to see order lines and total order value.

6. To complete the process you must then click on either Free of Charge Delivery or enter an amount charge. (This is extra to work time and is added to total order value).

7. When you have set the delivery charge, the icon on the bottom right allows you to **Ship Goods** to complete the order.





How to ship posted orders

1. Go into the **Picking Lists** icon on the left of the main screen.

2. If the customer has paid by credit card tick **Awaiting Picking/Order Completed**. Click on the order you want to ship and click **Release for Picking**. Tick **Awaiting Payment Confirmation** then follow steps 4 – 7.

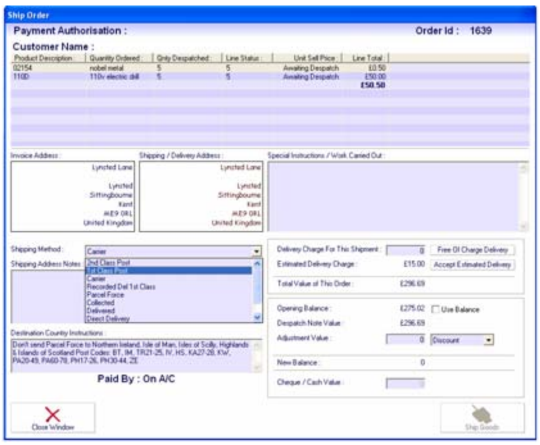
3. If the customer has paid by cheque or on account tick **Ship Account Order**. Click on the order you want to ship and a screen will appear called **Despatch Delivered** then follow steps 4 – 7.

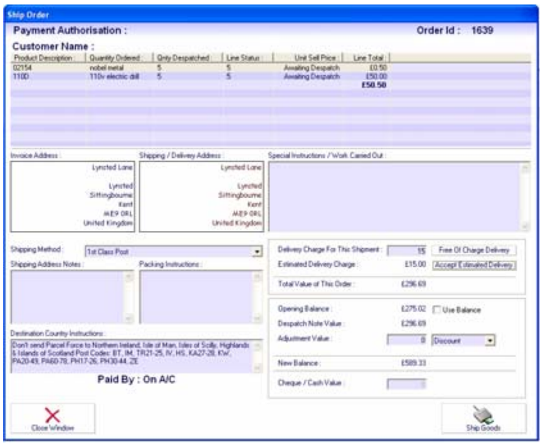
4. You can either scan with your scanning tools, the barcodes of the items you are sending, or you can type the product codes in. If a product code is not found you can also search for the product using the search wizard keywords etc.

5. When you have finished click **Complete and Pay** at the bottom of the screen, this brings you to the next window called **Ship Order**. This screen allows you to see order lines and total order value.

6. Choose the shipping method e.g. 1st Class Post, then you can either **Accept Estimated Delivery** or enter your own postage cost in **Delivery Charge For This Shipment**.

7. When you have set the postage cost, the icon on the bottom right allows you to **Ship Goods** to complete the order.





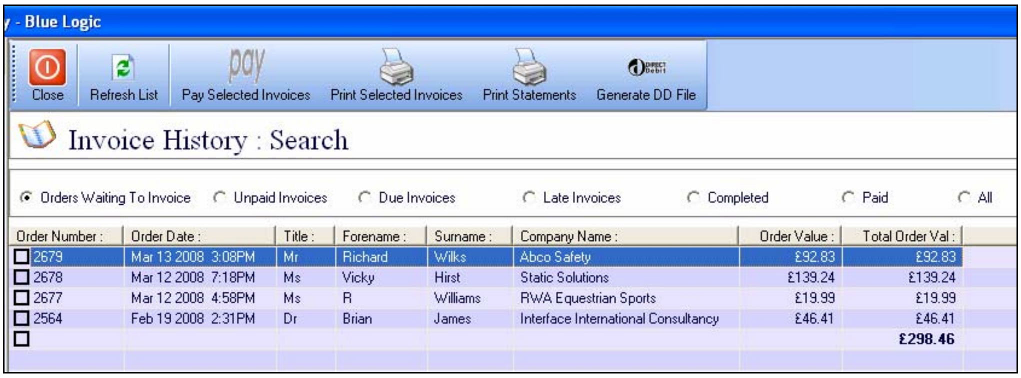
How to invoice using multiple orders

1. From the main menu, click on the **Invoicing** icon, then tick the title **Orders Waiting to Invoice**, this brings up all the orders currently not invoiced yet.

2. Highlight all the orders you wish to group together (**Select only the same customer**) onto one invoice by ticking each one.

3. Right click and select **Raise Invoice**.

PLEASE NOTE – order lines cannot be de-selected after you have raised an invoice, so the same customer must be correct at that point.

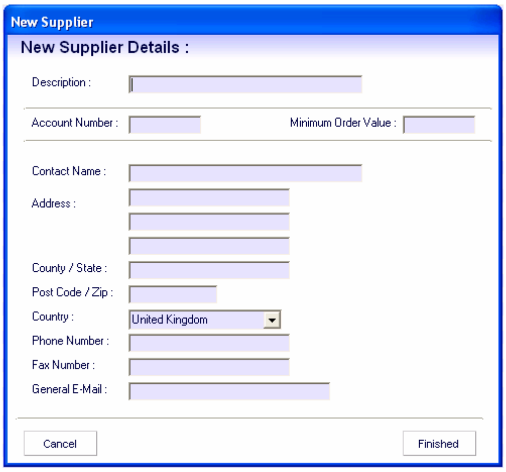


How to create a supplier

The supplier module is very similar to the customer one.

1. Click on **Suppliers** on the left of your screen.

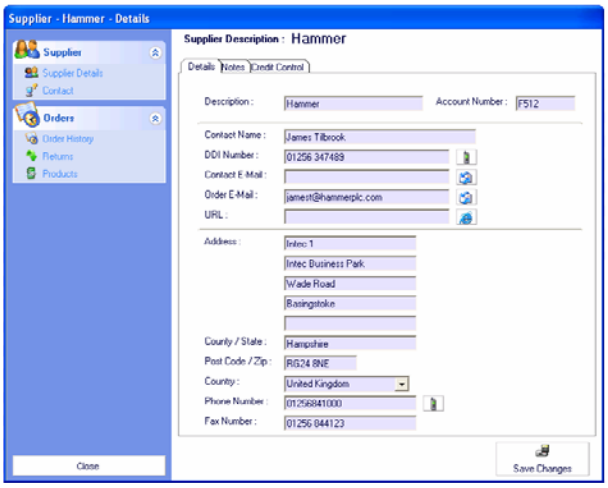
2. Click on the icon situated at the top of your screen: **New Supplier** this will bring up a smaller window where you can type in all the details.



How to edit supplier details

1. To edit supplier details open the supplier you want to edit.

2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save Changes to keep the amendments.



Note:

You can also look here for order history with the supplier, returns and you can also view all product information from this supplier.

How to use the supplier search function

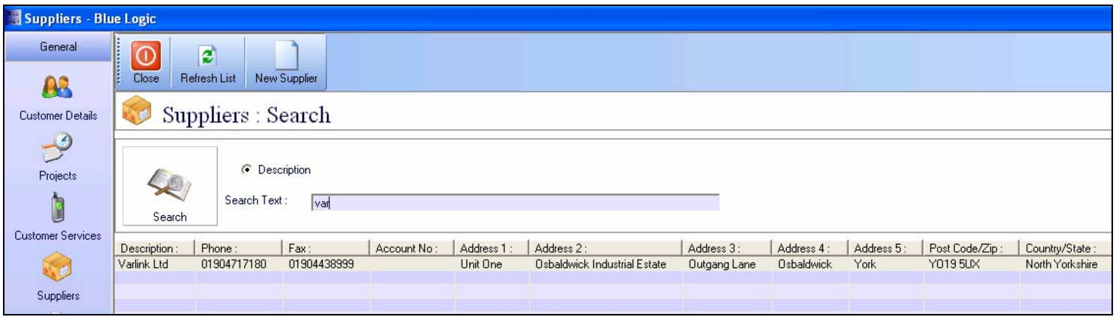
The search function is very useful when you are trying to locate an existing supplier.

1. Go into the supplier details screen.

2. Type in the **Search Text** box the information you have for the supplier e.g. “Var” for “Varlink”.

3. Click on the **Search** button and the results will show the suppliers with “int” in the title.

4. Click on the supplier you want and the details screen will appear for that supplier.



How to place & receive purchase orders

When an order is placed by a customer the stock level for the product is automatically adjusted and an order is created with the default supplier, if there isn't any stock. An order would also be created if the minimum order level is breached by using the product in stock for the order.

1. To place a purchase order with a supplier, click on the **PO History** icon on the left of your screen. This will bring up the **Supplier Purchase** order screen.

2. Tick **Quotes** at the top of the screen. This will bring up all the purchase orders yet to be placed with a supplier.

3. Double clicking the correct supplier will bring up the order to be placed, and will show all of the order lines in detail.

4. Sometimes orders need to be placed with suppliers that are not related to a specific order or stock level. This can be done by adjusting the order quantities, or by adding a new item using the **Add Item to Order** button on the bottom of your screen. All the items not relating to a specific order will appear in the **Quantity Extra** column on the order.

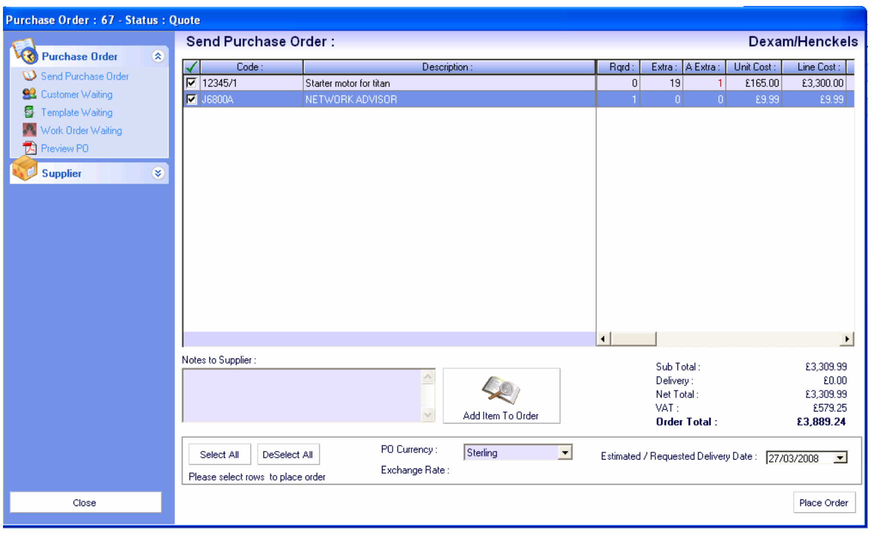
5. Select all of the items you want to order from the supplier by ticking the box on the left, or press the **Select All** button at the bottom of your screen to order them all.

6. Before you place the order, choose which currency you would like the purchase order to be in, e.g. Sterling.

7. You can also preview your order before you send it to your supplier, just press the **Preview** button.

8. Place the order by pressing the **Place Order** button on the right of your screen.

Please Note: When you place the order Blue Logic will send your order by E-Mail, Fax and will allow you to print it.



How to create a product

1. Click on the **Product** icon on the left of the main screen. From this screen you can search for any product.

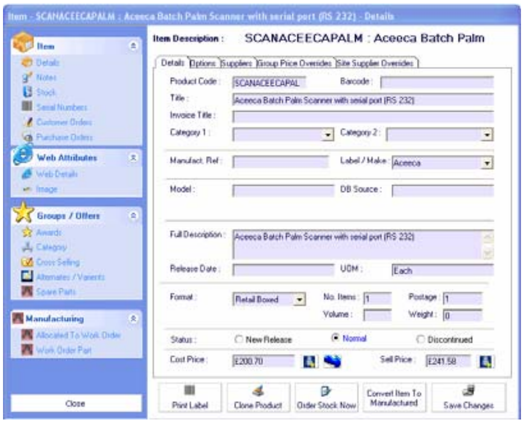
2. To create a new product, click on the **New Product** icon on the top pf your screen. This brings up a **New Product** window, where you can type in all the relevant details you have regarding the product.

3. You can then select to open the product upon creation when you click Finished.

How to edit product details

1. To edit product details open the product you want to edit.

2. Click the line you wish to edit, highlight the text and type over the existing text, then click Save Changes to keep the amendments.



Note:

In the Product details screen you can search for order history, returns, product and stock information, including current stock levels, and where the stock is located.

You can have multiple suppliers for a product. Click on the **Suppliers** tab on the product details page and tick any of the companies who can supply the product. You can also change the default supplier of the product, use the drop down box and select a new default supplier. You can also use this information to populate your website with the very latest products.

How to use the product search function

The search function is very useful when you are trying to locate an existing product. With products you have two search options, either **Search** or **Advanced Search**.

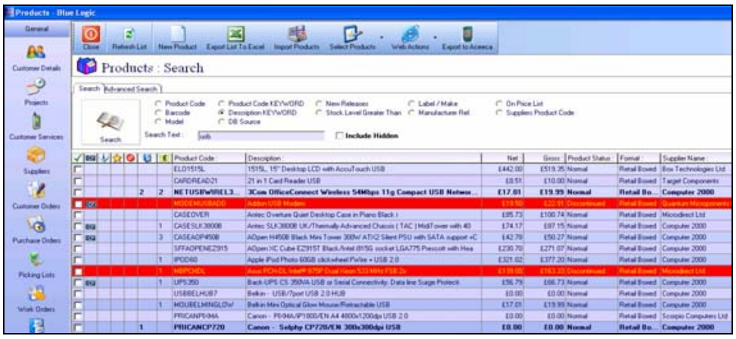
Search

1. Go into the Products screen, click on the **Search** tab.

2. Choose if you want to search for the **Description Keyword** etc, by ticking the relevant boxes. Type in the information you have for the product e.g. “usb” for a usb cable.

3. Click on the **Search** button and the results will show products with “usb” in the title.

4. Click on the product and the details screen will appear for that product.



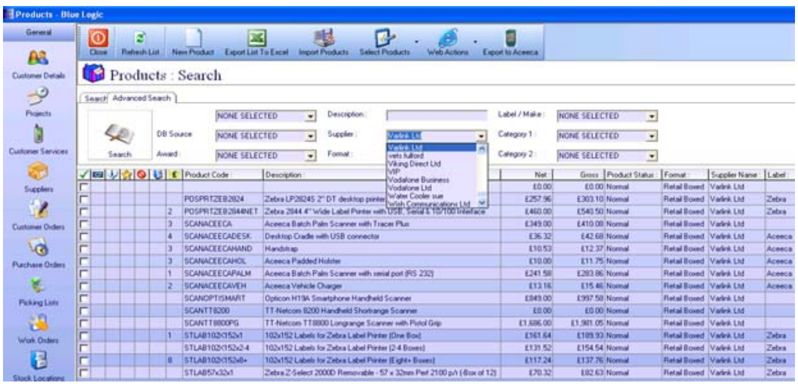
Advanced Search

1. Go into the products screen, click on the **Advanced Search** tab.

2. Choose if you want to search for a product e.g. from a certain supplier etc, by using the drop down menus. When you have clicked on the relevant drop down menu, choose which supplier you wish to search for, e.g. Varlink.

3. Click on the **Search** button and the results will show what products that particular supplier sells.

4. Click on the product you want and the details screen will appear for that product.



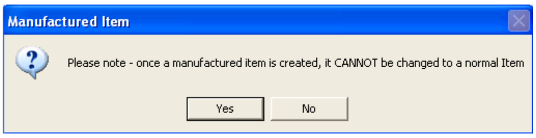
How to do manufacturing

1. Go into the Products screen and click **New Product**.

2. Type in the details for the new product.

3. Make sure you tick the **Manufactured Box** and the **Open Product on Completion** tick box.

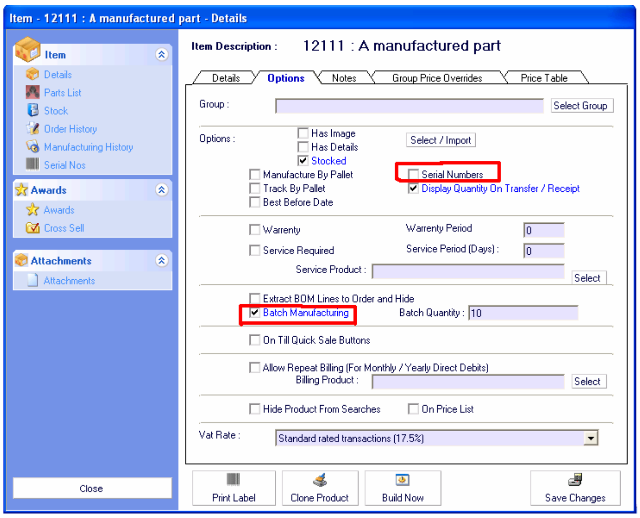
4. Click Finish, a warning window will appear, advising once a manufactured item is created, it cannot be changed to a normal item. Click Yes.



5. The product will open, click on the **Options** tab, you can choose either **Batch Manufacturing** or **Serial Numbers**.

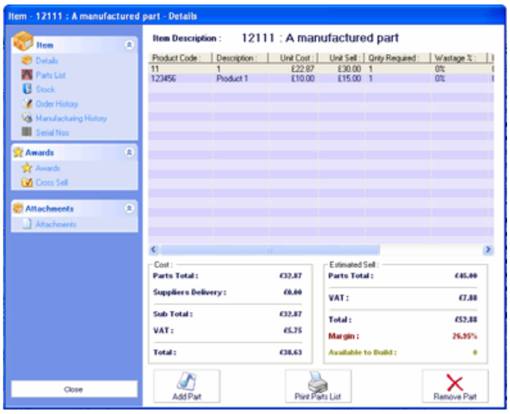
   - Batch Manufacturing is an option if you wish to make multiple quantities of the same product, e.g. 10.

   - Serial Numbers is an option if you have one item to make and you wish to allocate a Serial Number to that one item.

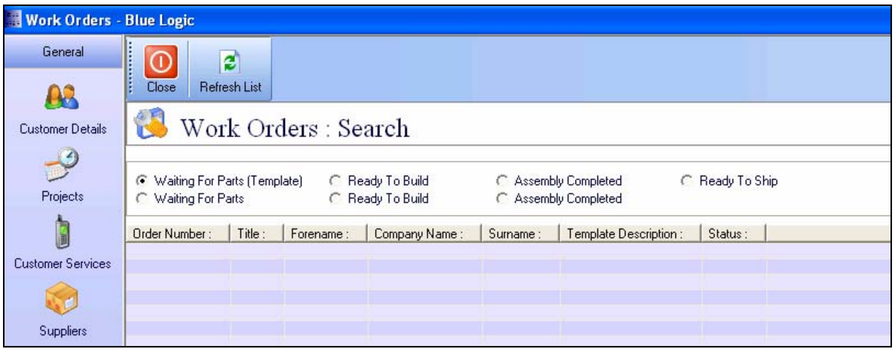


6. Click on **Parts List** and click **Add Parts**. At this stage you can also add non-stocked products, such as Labour, electricity charges etc. (You need to add these as new products; they will then appear in the Parts List).

7. At the bottom of the Parts List screen, there are 2 columns showing the Cost Price to you and the Estimated Sell Price, you can over-ride this by clicking on **Details** and inputting a set cost or sell price.

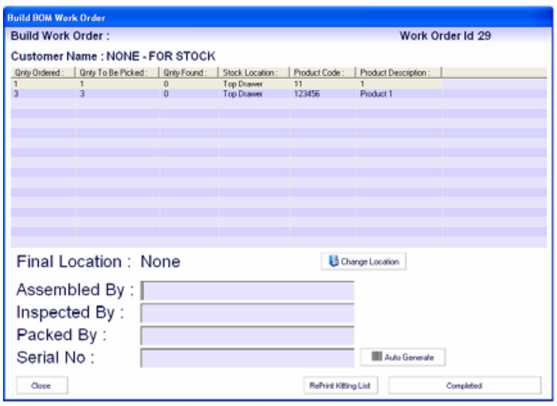


8. Click **Build Now** enter the quantity of how many products you want to build. This will create a work order.



9. There are several stages, when you get to the **Work Orders** screen, depending at what stage the manufactured item is at.

- **Waiting for Parts**, an item will appear in this section if some of the parts are not in stock.
- **Ready to Build**, an item will appear in this section if all the parts are in stock and the item is ready to be built.
- **Assembly Completed**, the item is built.
- **Ready to Ship**, the item is ready to be shipped to the customer.



How to re-stock your van

1. Double-click the **Re-stock van** icon on the warehouse computer, this brings up a page for you to use.

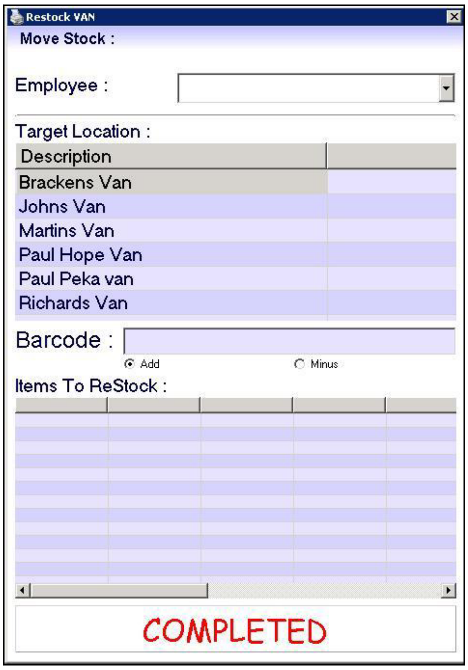
2. Choose the employees name from the drop down menu at the top of the screen.

3. Select your vehicle (or vehicle you want to re-stock)

4. Scan in the items you wish to restock by scanning the barcode with the scanning tool. This changes the stock location of the product to the van.

Please Note:

You cannot enter stock here that has not previously been in warehouse stock.



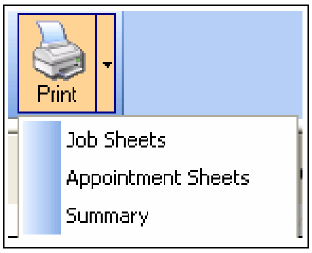
How to print a job sheet

1. Click on the diary icon on the left hand side of the main screen.

2. Select a period e.g. day, week or month to view.

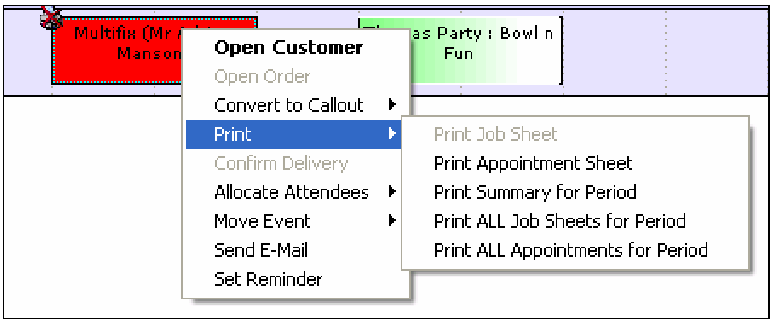
3. Click **Print Job Sheet**; this will print all the job sheets for all the employees for that period.

4. Give the job sheets to the employees to do the specified jobs.



5. If only a single job sheet is required, right click on the relevant appointment on the diary page and select **Print Job Sheet**.

6. Once printed the date and time of last printing is shown, also an icon on each appointment changes to indicate that sheet has been printed.



How to enter completed job sheets & delivered orders

When you receive completed job sheets from an employee, with bar code labels stuck on the back, to scan into the computer.

1. At the main menu, go into the **Picking Lists** icon on the left of the screen.

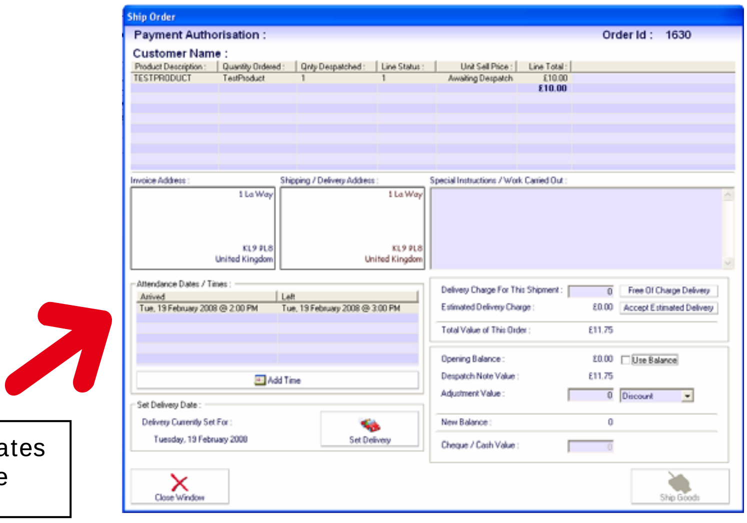
2. Tick the title **Ship Account Order** which is situated at the top of the screen, this brings up a list of all the jobs waiting to be completed.

3. Choose the order number you have the job sheet for, double click and go into **Despatch**.

4. Using your scanning tool scan all the barcodes attached to the job sheet. You can also type product codes in and if not found you can also search for the product using the search wizard, keywords etc.

5. When you have finished, click **Complete and Pay** at the bottom of the screen, this then brings you to the next window called **Ship Order**.

6. The **Ship Order** screen allows you to see the order lines and total order value. Also at the bottom left hand side you can see the job sheet attendance dates for the order. If the dates/times are different to that scheduled on the diary you can click on **add time**. This takes you into the diary to add additional work time to the order.



Attendance Dates & Add Time

7. To complete the process you must then click on either **Free of charge delivery** or enter an amount to charge. (This is extra to work time and is added to the total order value).

8. When you have set the delivery charge, the icon on the bottom right allows you to **Ship Goods** to complete the order.

9. Upon shipping a small window will appear, which gives you the option of creating an invoice at that time, which allocates one order to an invoice. If you click no then you will the opportunity to create invoices from multiple orders back in the main menu from the **Invoicing** icon.

How to use CTI/TAPI functions

Tapi/CTI allows integration into your existing office telecoms systems. This allows you to view statuses of other extensions, **Screen Popping** of client and supplier details and direct calling with a single mouse click.

With TAPI, when the phone rings the phone number automatically appears on the desktop and the customer’s details appears on your screen, to allow for instant recognition of the customer status and for any details to be changed, updated etc.

TAPI is proven to be invaluable, especially for the mail-order and customer service environment.