

**Login**

# DMSi Agility

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aostdiek

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.....

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## Welcome to Agility (on the Web)

The business software you rely on is now accessible from anywhere as a native web application. Transitioning Agility to the web has been a major initiative for us at DMSi and for you, our customer. We are grateful for your continued support and look forward to hearing from you as more Agility screens are added here over time. Looking ahead, our current goal is to go live with all the functionality you need to generate quotes and sales orders, view customer information, and invoice orders by the end of 2024. New updates will be released regularly to provide you with a complete transition to the web by 2026.

### Join the DMSi Customer Community

Connect to over 300 DMSi customers who have already signed up. The platform provides resources and discussion channels, allowing Agility users to network with each other and get feedback from DMSi representatives. We'd love to see you there.

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### Participate in Agility User Research

Help shape the future of Agility by signing up for user research! Your voice is crucial to creating the best possible experience for all users as we move forward with transitioning Agility to the Web (A2W).

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## **Customers**

**Quotes & Orders** ▾

**Purchasing** ▾

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**Items**

**Inventory** ▾

**Accounts Receivable** ▾

**Accounts Payable** ▾

**General Ledger** ▾

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**System Maintenance** ▾

# Customers

## Quotes & Orders ^

Quotes

Sales Orders

Credit Memos

## Purchasing ▼

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## Items

## Inventory ▼

## Accounts Receivable ▼

## Accounts Payable ▼

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**For historical comments, history, or branches, see the  
original archive file: [LINK](#)**

## **Sales Order Creation & Order Entry**

### **Accessing Sales Orders**

Users are able to view/edit/create sales orders from several locations in Agility.

The following mockups outline the two main locations for completing these actions. These include: from within the Sales Order module and from within a Customer's account.

There are also shortcuts throughout the system that will need to be handled as they are discovered in other stories.

1

#### **Within a Customer**

One way to see a list of sales orders to choose from or to start a new sales order is from within a specific customer. This would be found under the 'Quotes/Orders' menu option in that customer and then 'Sales Orders'. Clicking "+ Create Sales Order" or opening an existing sales order will open a new tab.

2

#### **Within Sales Order Module**

From the Sales Order module, users will be able to search for existing sales orders and also create new sales orders by clicking the '+ Create Sales Order' button. To open an existing sales order, the user can click on the sales order in the search results and open it in a drill through screen.

A "Recents" panel will be used here, as well.

Home

Nevada Jones Inc - Hencerson X

Customers &gt; Customer: Nevada Jones, Inc - Henderson: Sales Orders

Customer Information



Credit



Quotes &amp; Orders



Quotes

Sales Orders

Item Order History

Invoices

Payments

Settings



Customer ID: NVj001

View by Customer Level

Ship-to ▾



Default Bill-to: 2

## Nevada Jones, Inc - Henderson

Credit - Good

546 2nd Ave, Henderson NV, 89002

### Customer Contact

(555) 402 - 9117

### Primary Contact

Brian Wilson

### Sales Agent

Sarah Smith

### Home Branch

Weston

sales@NVjones.com

(555) 402 - 9154

(---) -----

bwilson@NVjones.com

## Sales Orders

+ Create Sales Order

### Search Criteria

#### Search By

SO ID

Starting at

#### Search For

#### Status

Open/Partial Picked Staged Invoiced Canceled

Open SO Viewer

Search

### Search Results



Lorem Ipsum							
-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------

**No Results**

To view results, enter or update your search criteria and click "Search".



Home Sales Orders X

Sales Orders

## Sales Orders

Branch Eastmond



+ Create Sales Order

## Search Criteria

## Search By

Customer name (Ship-to)

Beginning with

## Search For

## Status

 Open/Partial    Picked    Staged    Invoiced    Canceled

Open SO Viewer

Search

## Search Results

Lorem Ipsum							
-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------

## No Results

To view results, enter or update your search criteria and click "Search".

## Recents

1000234566 · WESTONBRANCH · Nevada Jones, Inc

3

### **Creating a Sales Order - Default Header Layout**

For now, this will be the default header layout. It is laid out in the same order as quotes but with several additional fields.

See mockup for UI, wording, arrangements, etc.

- Note: The Create Sales Order screen is mocked up as a drill thru screen, however, as of 10/2/24, this screen will first have to be developed as a modal since we do not have the ability to make it a drill thru in Fluid yet. This occurred with Quotes as well.

Customization coming soon.

Note: the buttons included next to some inputs are to show placement at this time. The individual windows are out of scope for this story

- Customer: Add customer icon allow users to create a new customer
- Tax Code: search icon opens tax code locator, location icon opens zip code locator
- Customer PO: (see below)
- Sales Agents: edit icon (handled in separate story)
- Sales Project: the new window icon will replace the “Go” button and open the sales project
- Authorized to Charge: (handled in separate story)
- Expected delivery date: the re-calculate icon will re-calculate the delivery date
- Payment Terms: opens Invoice Term Preview (handled in separate story)
- Source ID: the new window icon will replace the “Go” button in classic Agility and open the source transaction

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### **Incoming PO Fields**

In Classic Agility, users can access the “Incoming PO Fields” window from the Information ribbon in sales orders.

This window, however, is more closely associated with the sales order header. Not all of its fields are on the header, though.

As a result, in A2W, the access point for Incoming PO Fields will be placed in the header information of the order as an icon button next to the “Customer PO” field.

It will use the icon: quick\_reference\_all

5

### **Checkbox Groups in Order Terms Section**

A couple checkbox groups were created in the Order Terms section to help group some similar options together and to follow our A2W pattern of labeling checkbox groups.

First, the two “Tag new items for...” options were given a label of Fill From Options.

Second, the four “Create ... on save” options were given a label of On Save Options so that the repetitive nature of the existing checkboxes could be reduced. They now just say “Create...”

Lastly, seven varying checkboxes were grouped into an Additional Options.

6

### **Miscellaneous Information**

For full details about the Misc Information in a transaction, see this story: [LINK](#)

Extra

### **Long Read-Only Label**

A new field was recently added to the sales order header in Classic that will require a long read-only label when displayed in the read-only header of A2W. This field is the “Require full payment for partial shipment to invoice” in the edit version of the header. The read only label can be shortened to “Require Full Payment on Shipment”.

We would like to potentially try two options for this when it starts to be developed. These two options will be:

- Wrap the text
  - Pro: Can see the full label
  - Con: Might mess with the alignment of the rows
- Truncate the text (display full on hover)
  - Pro: Alignment of the rows stays intact
  - Con: Only see part of the label

For now, in the mockups, it is shown as truncated in the read-only header.

As both of these options are explored, please communicate with the designer (Abby) to determine which one to use moving forward.

Home

Sales Orders

Sales Orders &gt; Create Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

## Order Information

Currency: USD

Customer ID	Ship-to Seq #	Customer Name	Ship-to Name	Ordered By
<input type="text"/>	<input type="text"/>	-----	<input type="text"/>	<input type="text"/>
Address 1		Address 2	Address 3	Taxable <input type="checkbox"/> Set as taxable
City	State	Zip	Country	Phone
Sale Type		Customer PO	Job Number	Tax Code
Sales Agents		Total Sales Agent %	Sales Project	Reference
Contact Name		Contact Email	Contact Phone	Contact Mobile Phone
Contact DIY Notify Method		Miscellaneous Information	Loyalty Dollars Earned	Loyalty Points Earned
Rewards Available			-----	-----
		Reward Expiration Date		

## Shipping Information

Expected Delivery Date	Expected Ship Date	Route ID	Ship Via
<input type="text"/> MM/DD/YYYY	<input type="text"/> MM/DD/YYYY	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Override expected delivery date			<input type="checkbox"/> Ship complete

Cancel

Start Sales Order

Home Sales Orders X

Sales Orders &gt; Create Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

## Order Information

Currency: USD

Customer ID	Ship-to Seq #	Customer Name	Ship-to Name	Ordered By
Nvj001	1	-----	Nevada Jones Inc - Henderson	
Address 1	Address 2	Address 3	Taxable	<input type="checkbox"/> Set as taxable
546 2nd Ave				
City	State	Zip	Phone	Tax Code
Henderson	NV	89002	(402) 555-1234	Tax - 168
Sale Type*	Customer PO	Job Number	Reference	
Delivery	1223322-WDS	1223322-sdr	122322-123	
Sales Agents*	Total Sales Agent %	Sales Project	Authorized to Charge	
-----	-----	Project 12233	Bill Smith	
Contact Name	Contact Email	Contact Phone	Contact Mobile Phone	
		( ) -	( ) -	
Contact DIY Notify Method	Miscellaneous Information*	Loyalty Dollars Earned	Loyalty Points Earned	
	Various	-----	-----	
Rewards Available	Reward Expiration Date	Ship Via		
\$2.00	11/12/2024 (Earliest)		<input type="checkbox"/> Ship complete	

## Shipping Information

Expected Delivery Date	Expected Ship Date	Route ID	Ship Via
MM/DD/YYYY	MM/DD/YYYY	TH-12	
<input type="checkbox"/> Override expected delivery date			

Cancel

Start Sales Order

Home

Sales Orders

Sales Orders &gt; Create Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

[General](#) [Miscellaneous Information](#)

## Order Information

Currency: USD

Customer ID	Ship-to Seq #	Customer Name	Ship-to Name	Ordered By
<input type="text"/>	<input type="text"/>	-----	<input type="text"/>	<input type="text"/>
Address 1	Address 2	Address 3	Taxable	<input type="checkbox"/> Set as taxable
City	State	Zip	Country	Phone
Sale Type	Customer PO	Job Number	Reference	Tax Code
Sales Agents	Total Sales Agent %	Sales Project	Authorized to Charge	<input type="text"/>
Contact Name	Contact Email	Contact Phone	Contact Mobile Phone	<input type="text"/>
Contact DIY Notify Method	Loyalty Dollars Earned	Loyalty Points Earned		
Reward Available	Reward Expiration Date	-----		

## Shipping Information

Expected Delivery Date	Expected Ship Date	Route ID	Ship Via
<input type="text"/> MM/DD/YYYY	<input type="text"/> MM/DD/YYYY	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Override expected delivery date			<input type="checkbox"/> Ship complete

Cancel

Start Sales Order

Home Sales Orders ×

Sales Orders &gt; Create Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

[General](#) [Miscellaneous Information](#)

## Order Information

Currency: USD

Customer ID	Ship-to Seq #	Customer Name	Ship-to Name	Ordered By
Nvj001	1	-----	Nevada Jones Inc - Henderson	-----
Address 1	Address 2	Address 3	Taxable	<input type="checkbox"/> Set as taxable
546 2nd Ave	-----	-----	-----	-----
City	State	Zip	Country	Phone
Henderson	NV	89002	-----	(402) 555-1234
Sale Type	Customer PO	Job Number	Tax Code	Reference
Delivery	1223322-WDS	1223322-sdr	Tax - 168	122322-123
Sales Agents	Total Sales Agent %	Sales Project	Authorized to Charge	Contact Name
-----	-----	Project 12233	Bill Smith	-----
Contact Name	Contact Email	Contact Phone	Contact Mobile Phone	-----
-----	-----	( ) -	( ) -	-----
Contact DIY Notify Method	Loyalty Dollars Earned	Loyalty Points Earned	-----	-----
-----	-----	-----	-----	-----
Reward Available	Reward Expiration Date	-----	-----	-----
-----	-----	-----	-----	-----

## Shipping Information

Expected Delivery Date	Expected Ship Date	Route ID	Ship Via
MM/DD/YYYY	MM/DD/YYYY	TH-12	-----
<input type="checkbox"/> Override expected delivery date	-----	-----	<input type="checkbox"/> Ship complete

[Cancel](#)[Start Sales Order](#)

Home

Sales Orders

Sales Orders &gt; Create Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

[General](#) [Miscellaneous Information](#)

## Miscellaneous Information

Currency: USD

Misc Field 1	Misc Field 1	Misc Field 1	Misc Field 1
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Misc Field 1	Misc Field 1	Misc Field 1	Misc Field 1
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Misc Field 1	Misc Field 1	Misc Field 1	Misc Field 1
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Latitude	Longitude	Date 1	Date 2
<input type="text"/>	<input type="text"/>	<input type="text"/> MM/DD/YYYY	<input type="text"/> MM/DD/YYYY

Cancel

Start Sales Order

## Create Sales Order

SO ID	Status	Order Date	Created By
-----	In Process	07/20/2023	-----

### Order Information

Currency: USD

Customer ID Nvj001	Ship-to Seq # 1	Customer Name -----	Ship-to Name Nevada Jones Inc - Henderson	Ordered By -----
Address 1 546 2nd Ave	Address 2 -----	Address 3 -----	Taxable <input type="checkbox"/> Set as taxable	
City Henderson	State NV	Zip 89002	Country -----	Phone (402) 555-1234
Sale Type* Delivery	Customer PO 1223322-WDS	Job Number 1223322-sdr	Tax Code Tax - 168	Reference 122322-123
Sales Agents* -----	Total Sales Agent % -----	Sales Project Project 12233	Authorized to Charge Bill Smith	
Contact Name -----	Contact Email -----	Contact Phone ( ) -	Contact Mobile Phone ( ) -	
Contact DIY Notify Method -----	Miscellaneous Information* Various	Loyalty Dollars Earned -----	Loyalty Points Earned -----	
Rewards Available \$2.00	Reward Expiration Date 11/12/2024 (Earliest)			

### Shipping Information

Expected Delivery Date MM/DD/YYYY	Expected Ship Date MM/DD/YYYY	Route ID TH-12	Ship Via -----
<input type="checkbox"/> Override expected delivery date			<input type="checkbox"/> Ship complete
OA Expected Delivery Date -----	Original OA Expected Delivery Date -----		

### Order Terms

Freight Terms -----	Price Level -----	Payment Terms -----	Invoice Via -----
Accepts Backorders <input checked="" type="checkbox"/> Yes	Full Payment Required <input type="checkbox"/> Require full payment <input type="checkbox"/> Require full payment for partial shipment to invoice		
Fill From Options <input type="checkbox"/> Tag new items for PO <input type="checkbox"/> Tag new items for reman	On Save Options <input type="checkbox"/> Create cut file <input type="checkbox"/> Create PO <input type="checkbox"/> Create reman <input type="checkbox"/> Create transfer	Additional Options <input type="checkbox"/> Mark as special order <input type="checkbox"/> Place on hold <input type="checkbox"/> Print price on pick and delivery tickets <input type="checkbox"/> Reprice order at shipment	<input type="checkbox"/> Force new items to backorder <input type="checkbox"/> Append to open transfer

### Source Information

Source ID -----	Source Branch -----	Source -----

## Sales Order Creation & Sales Order Entry

### 8 Sales Order Entry Screen

After clicking the 'Start Sales Order' button, users will land on the main sales order page to start adding items.

### 9 Header Display - Summary

At the top of the screen is the sales order header information.

Users can decide how much of the header information they want to see when on the main order screen by using the toggle in the upper right hand corner. The left icon is for the Summary Header and the right is for the Full Header.

Users will land on the summary header by default. See mockup for detail

### 10 Header Display - Full

The default full header display is shown in the second mockup (explored many different iterations trying to keep like content close-ish without awkward word wraps).

Question for Product: Working on a general default header display like quotes... again, we don't know what every customer wants but customization is coming... wanted to see if, for the initial default if there are certain pieces of information that we definitely want to make sure are displayed in the collapsed summary view?

### 11 Editing Header Information

If users would like to edit the header information later, they would do so by clicking the 'Edit' button in the upper right hand corner. This will take them to a drill through screen where they can 'Edit Sales Order' (much like the 'Create Sales Order' screen, just different title and action bar).

### 12 Opening Customer's Information

From the header, users will be able to navigate to the customer that the sales order is for by clicking on the linked customer ID and name. This will open the customer in a new tab so that they can switch back and forth as desired and can view whatever information they want about the customer from that customer dashboard.

### 13 Customer Information Shortcuts

Users will also be provided some shortcuts to specific customer information through the "More" menu icon to the right of the customer's hyperlinked name. While we hypothesize that these shortcuts are not needed as much in A2W due to the improved IA and ease of navigation, there is a desire from Product to still include at this time. This solution matches what was done in A2W with the AR Open & Paid screen.

The blue dot is an indicator for notes to view.

- When the menu is closed, the blue dot shows on the more menu icon button. When the menu is open, the blue dot does not show on the more menu icon button and only shows in the opened menu.

When one of the options is selected it will open the full Customer Information for the user and be opened to the correct menu option.

Would like tracking on how often these are used vs just opening Customer Information with the hyperlink and going from there.

These shortcuts handle:

- Customer Notes
- Credit Profile (formerly Inquiry)
- Contacts
- Lien Information
- Tax Resale Certificates (for more info on this option see [LINK](#))

### 14 Tabs

The main sales order screen has several tabs below the header. The content under each of these tabs will be addressed in separate stories:

- Sales Order (this story)
- Picking & Shipping
- Dispatches
- Payments
- Related Transactions
- Notes
- Messages
- More (this story)

### 15 More Tab

There are several miscellaneous/underused options within the sales order ribbon in Classic that will now be placed as hyperlinks within a "More" tab in the sales order tab structure. These include:

- Saved Viewers
  - See mockup for menu that opens when Saved Viewers dropdown is clicked. At the top of that submenu will be the names of the current saved viewers that when clicked will open and run the viewer. Beneath these saved viewers will be a divider line followed by an action of "Add Saved Viewer" so that they can add another if desired.
- Doc Storage
- Signatures
- Images
- Remote Files
- EDI Forms
- Credit Status History

This allows the primary tabs/actions to be the primary and simplify the rest of the screen

Note: We had originally hoped to use a More dropdown tab that would just show these options in a menu when the tab was clicked on (instead of actually opening a full tab and then using these links) but that is not possible with Fluid/Smartclient so this is the current workaround solution. The original, preferred solution is shown as disabled so that it is not lost in case it can be accomplished in the future. The Smartclient component that was being considered was the moreTab

### Allowing Copy & Paste from Grids

We would like to see if we can allow users to copy and paste from a grid (either on this story or another). Jason said there is a "Can Select Cells" property and wonders what it would do if set to true and how that would impact the system. Please let Jason and the Design team know what the findings are regarding this functionality for A2W.

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVj001 · Nevada Jones, Inc - Henderson · Ship-to #1 : ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Email Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %
<input type="text"/> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>			\$0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00% <span style="border: 1px solid blue; padding: 2px;">Open Detail Entry</span> <span style="border: 1px solid blue; padding: 2px;">:</span> <span style="border: 1px solid blue; padding: 2px;">Add Item</span>
Available: -----			Extended Price: -----	GM: -----	
			Discount: -----		
			Cost: -----		

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM	Available	On Hand
No Line Items												

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
: Apply Payment Print Save Invoice Sales Order

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVj001 · Nevada Jones, Inc - Henderson · Ship-to #1



⚠ Prospect, Not Active, Non-Saleable

⚠ Full Payment Required



546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	-----
Price Level	Payment Terms	Freight Terms	Expected Delivery Date	Expect Date Overridden	Expected Ship Date	OA Expected Delivery D...	Original OA Expected De...
Golden	Net_30	-----	12/11/2024	✓ Yes	12/11/2024	Rute	Tina X
Route ID	Ship Complete	Taxable	Tax Code	Sales Project	Authorized to Charge	On Hold	Special Order
SR - Truck01	✓ Yes	✓ Yes	Tax-186	Project 122	Project 122	✗ No	✗ No
Contact Name	Contact Email	Contact Phone	Contact Mobile	Contact DIY Notify Met...	Source ID	Source Branch	Source
Jay Smith	jsmith@gmail.com	(402) 340 - 1234	-----	122322-sdr	12233	-----	-----
Sales Agent 1	Sales Agent 2	Sales Agent 3	Sales Agent 4	Sales Agent 5	Sales Agent 6	Total Sales Agent %	Treat as Pass-thru
Sam	-----	-----	-----	-----	-----	-----	✓ Yes
Accepts Backorders	Force to Backorder	Require Full Payment	Require Full Payment ...	Print Price on Tickets	Reprice on Shipments	Append to Transfer	Tag to Fill From PO
✓ Yes	✓ Yes	✓ Yes	✗ No	✗ No	✗ No	✗ No	✗ No
Tag to Fill From Reman	Cut File on Save	PO on Save	Reman on Save	Transfer on Save	Created By	Updated By	Updated Date
✗ No	✗ No	✗ No	✗ No	✗ No	Abby	Tina X	12/12/2024
Ordered By	Loyalty Dollars Earned	Loyalty Points Earned	Rewards Available	Reward Expiration Date	Miscellaneous Information		
Rute	---	---	---	---	Various		

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

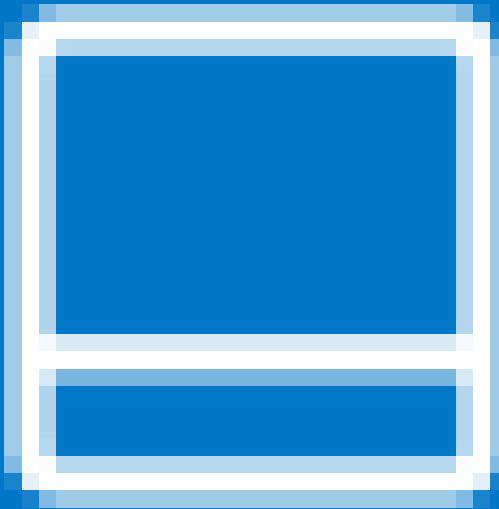
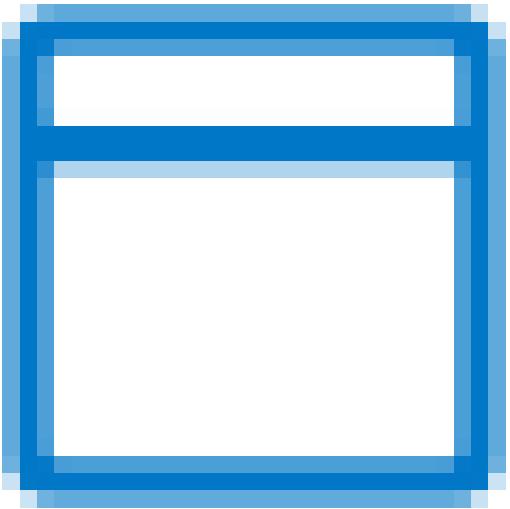
Currency: USD

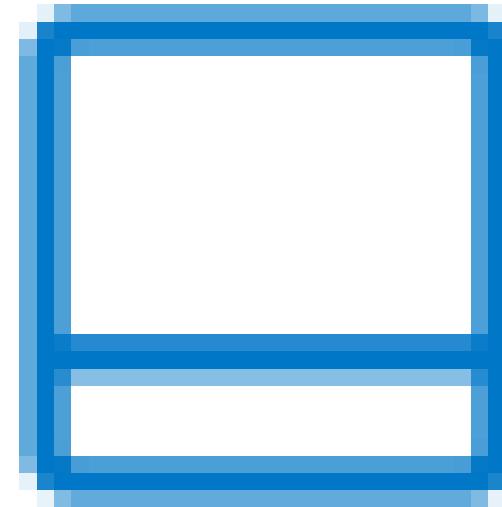
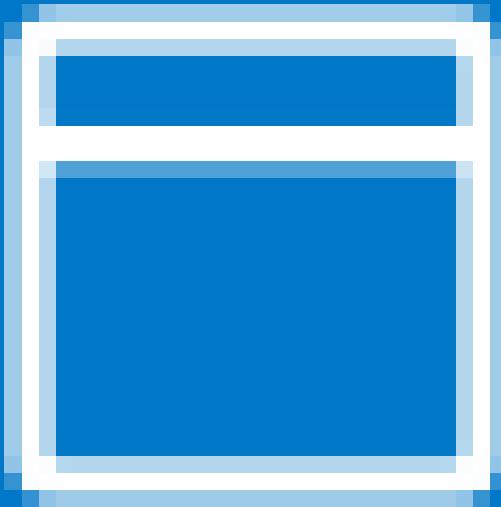
## Item Entry

^

Item	Quantity	Size	Description	Price	GM %
------	----------	------	-------------	-------	------

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)[Apply Payment](#)[Print ▾](#)[Invoice Sales Order](#)[✓ Save](#)





Home

Sales Order: 12233

Sales Orders &gt; Sales Order: 12233 &gt; Edit Sales Order

## Edit Sales Order

SO ID	Status	Order Date	Created By	Updated Date	Updated By
12233	In Process	07/20/2023	-----	-----	-----

### Order Information

Currency: USD

Customer ID	Ship-to Seq #	Customer Name	Ship-to Name	Ordered By
Nvj001	1	-----	Nevada Jones Inc - Henderson	
Address 1	Address 2	Address 3	Taxable	<input type="checkbox"/> Set as taxable
546 2nd Ave			<input type="checkbox"/>	
City	State	Zip	Phone	Tax Code
Henderson	NV	89002	(402) 555-1234	Tax - 168
Sale Type*	Customer PO	Job Number	Reference	
Delivery	1223322-WDS	1223322-sdr	122322-123	
Sales Agents*	Total Sales Agent %	Sales Project	Authorized to Charge	
-----	-----	Project 12233	Bill Smith	
Contact Name	Contact Email	Contact Phone	Contact Mobile Phone	
		( ) -	( ) -	
Contact DIY Notify Method	Miscellaneous Information*	Loyalty Dollars Earned	Loyalty Points Earned	
	Various	-----	-----	
Rewards Available	Reward Expiration Date	Ship Via		
\$2.00	11/12/2024 (Earliest)		<input type="checkbox"/>	

### Shipping Information

Expected Delivery Date	Expected Ship Date	Route ID	Ship Via
MM/DD/YYYY	MM/DD/YYYY	TH-12	
<input type="checkbox"/> Override expected delivery date		<input type="checkbox"/>	Ship complete

Cancel

Save

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## Quick Entry

A2W will allow users to quickly add product to an order without opening the detail entry all the time. In the Item Entry section above the grid, users can enter or search for an item, enter the quantity, enter the dimensional/length (for dimensional items), and add the item to the quote. They can also edit size, description, price, and GM % as needed.

Note: Some additional fields such as 'Available', 'Backordered', 'On Hand', 'Committed' and 'Cost' and 'GM' are shown as helper text under related fields to help give the user additional information.

- In Quotes, the only helper text that showed beneath the quantity field was "Available" quantity. In Sales Orders, however, the user has several other quantity fields that can be helpful to see. These are: Available, Backordered, On Hand, and Committed.

\*Keyboard interaction for quick entry: to move focus to the next field, users would either click on the field or pressing 'Tab' on their keyboard. To add item to the order, users would either click add item or pressing 'Enter' on their keyboard.

For enabling hot keys it sounds like dev will need to do some research into what the capabilities are, but those keyboard interactions will be crucial for speed.

If the user tries to print or save, etc, but have not added an item that was left in the item entry fields, they will receive a warning message.

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## "More" Menu on Quick Entry Line

The following menu options will be available in the "more" menu on the quick entry line for sales orders. If no item is entered yet in the item input, only the top options will be enabled.

Once an item is entered, the bottom options will also become enabled. These bottom options are the more heavily used detail entry options, so we brought them forward into this menu to help accommodate that. (See mockup for options)

- **Future Opportunity:** Allow that menu to be customizable so users can choose their most commonly used actions.

Note: The Branch Information icon button that appears next to the Available qty field in Classic Agility will be handled in the line item "More" menu in A2W in order to keep the quick entry streamlined and to place it with similar like actions, such as "View Stock Status" which is also housed there. It will be called "View Branch Information".

- Additionally, this will be an option in the Manage Additional Details Menu when in an item's detail entry screen. Similar to those other actions as well.

Note: Some of this menu is still being iterated on. Needing to determine if this is the best location for those.

- In particular, are going to be testing the location of the "Add Billing Header" option. Placing in this more menu for now since it adds to the grid, however, users may be thinking of this more at the transaction level, so placing it in the bottom more menu could make more sense. Need to include in usability testing. Reach out to Cindy McCarville as the contract billing expert. She can likely inform us of additional holes that we have in Classic surrounding contract billing...

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## Backordered Warning on Quantity Field

If the quantity for the item is going to be backordered, Classic Agility gives the user a warning icon on the backordered field. In A2W, that will be handled by adding a warning icon to the Backordered quantity text and changing the text color to Y700.

Note: May need some CSS work for some of this.

19

## Tally Calculator Item

After users have entered the item code, a separate tally calculator window will automatically launch for users to enter tally calculator details (the window itself is a separate story).

\*the calculator icon inside quantity will open up the tally calculator window, which is another alternative to enter item (the window itself is a separate story)

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## Sheet Good Item

When entering sheet goods, users need to enter the quantity and dimension to add that item to the quote. Alternatively to entering dimensions, users can search for the dimension by clicking on the search button inside the dimension field (the window itself is a separate story)

\*the calculator icon inside quantity will open up the tally calculator window, which is another alternative to enter tally (the window itself separate story)

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## Lumber Item

When entering lumber item, the dimension field title would become 'Length' once the item number is validated by the system (same behaviour as current Agility). Users need to enter the quantity and length to add that item to the quote. Alternatively, users can search for/select the available length by clicking on the search button inside the length field (the window itself is a separate story)

\*the calculator icon inside quantity will open up the tally calculator window, which is another alternative to enter tally (the window itself separate story)

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## Blank Item

The dimensional field will be hidden. It will only be shown after the item is entered and dimension is set up for the item. This is due to the number of customers we have that don't use dimension at all.

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Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 : ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Email Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %
<input type="text"/> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>			\$0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00% <span style="border: 1px solid blue; padding: 2px;">Open Detail Entry</span> <span style="border: 1px solid blue; padding: 2px;">:</span> <span style="border: 1px solid blue; padding: 2px;">Add Item</span>
Available: -----			Extended Price: ----- GM: -----		
Backordered: -----			Discount: -----		
On Hand: -----			Cost: -----		
Committed: -----					

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM	Available	On Hand
No Line Items												

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
: Apply Payment Print Save Invoice Sales Order

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 ⋮ ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Print Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
2301TC <span>🔍</span>	0.00 <span>CASE</span> <span>🔍</span>	1 in W	Tally Cal Molding	\$40.00 <span>CASE</span> <span>🔍</span>	0.00 %	<a href="#">Open Detail Entry</a>	<span>⋮</span>	<a href="#">Add Item</a>
Available: 35.00				Extended Price: \$39.99	GM: \$0.00			
Backordered: 0.00				Discount: \$0.00				
On Hand: 30.00				Cost: \$29.99				
Committed: 25.00								

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM	Available	On Hand
No Line Items												

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
⋮ Apply Payment Print ▾ Invoice Sales Order ✓ Save

# Quantity

100.00		BF	
--------	---	----	---

Available: 0.00

 Backordered: 100.00

On Hand: 30.00

Committed: 25.00

Quantity will be backordered for the item.

## Tally Calculator



Item	Size	Description	Tally Calculator UOM	Stocking UOM
OAK3C	3/4X3-1/2"	Oak Casing	PC	PC

Action	Quantity	Length	Tally Qty	Stocking Qty
<span>⋮</span>	<input type="text" value=" "/>	<input type="text"/>		
Total				

+ Add New Entry

Cancel

Continue

## Tally Calculator



Item	Size	Description	Tally Calculator UOM	Stocking UOM
OAK3C	3/4X3-1/2"	Oak Casing	PC	PC

Action	Quantity	Length	Tally Qty	Stocking Qty
	20.00	6	120.00	120.00
	<input type="text" value="1"/>	<input type="text"/>		
Total	20.00		120.00	

+ Add New Entry

Cancel

Continue

## Tally Calculator



Item	Size	Description	Tally Calculator UOM	Stocking UOM
OAK3C	3/4X3-1/2"	Oak Casing	PC	PC

Action	Quantity	Length	Tally Qty	Stocking Qty
⋮	20.00	6	120.00	120.00
⋮	20.00	8	160.00	160.00
⋮	<input type="text" value="1"/>	<input type="text"/>		
Total	40.00		280.00	

+ Add New Entry

Cancel

Continue

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 ⋮ ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Print Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
2301TC <span>🔍</span>	23.00 <span>✉</span> CASE <span>🔍</span>	1 in W	Tally Cal Molding	\$40.00 <span>CASE</span> <span>🔍</span>	19.00 %	<a href="#">Open Detail Entry</a>	<span>⋮</span>	<a href="#">Add Item</a>
Available: 35.00				Extended Price: \$39.99	GM: \$76.00			
Backordered: 0.00				Discount: \$0.00				
On Hand: 30.00				Cost: \$29.99				
Committed: 25.00								

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM	Available	On Hand
No Line Items												

To add an item to the quote, enter an item and quantity above and click "Add Item".

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
⋮ Apply Payment Print ▾ Invoice Sales Order ✓ Save

## 23 Line Items Grid

Once an item has been added to the sales order it will appear in the grid labeled 'Line Items'.

Note: When the item description is too long and either wraps or truncates (in either line item entry or grid), allow the full description to appear on hover.

Note: When developed, have the grid display the number of line items as totals. Other totals that are deemed valuable can be displayed as well. Will rely on Product to determine those.

## 24a Grid "More" Menu Actions

### Multi-Select Above Grid

Users can select an item's checkbox on the line items grid and complete actions from the 'More' menu above the grid much like they can do in Classic today. The menu that opens though has been adjusted to help the user by grouping like actions together and it only includes actions that can be done to multiple items at a time (Single select actions will be reserved for inline grid row actions to match A2W patterns).

The menu options are grouped much like Classic Agility's SO entry window today and closely match the menus that the user will find if they choose to edit the detail of an item or enter an item via detail entry.

These are the options that users will see when first opening the 'More' menu above the grid.

- Manage Order Processing
- Manage Price & Cost
- Manage Additional Details
- View Commit Information
- Manage Display Order
- Export
- Delete

If they click 'Manage Order Processing', 'Manage Price & Cost', or 'Manage Additional Details', the menu will 'drill through' to show the options within that group.

- We may not be able to accomplish this desired drill thru as seen in the mockups due to technical constraints. Smartclient is showing more of a nested popup menu where the original is displayed and the sub menu also pops up. An example of that Smartclient implementation is shown to the right of the mockups. We would like to see if the drill thru would still be possible but as an FYI it may not be so the submenus could end up looking different than the mockups in their implementation (just being a flyout instead of a drill thru). Please update the Design Team with findings.

Note: Many of the menu options have now adopted our A2W copy standards, becoming action-oriented phrases and being rewritten for clarity. Changes are based on A2W copy standards and Help Doc references.

Note:

- In Classic Agility, there is a "Commit Information" button on the Information ribbon of sales orders. This option allows the user to view commit and back order related information for all items on the sales order (instead of viewing for each individual item).
  - Since it is related to the line items, we recommend putting it in relation to the line items grid; however, it is not related to specific selected items. As a result, it will be placed in the "More" menu above the grid when it is first opened and not placed within a submenu because it is not item selection specific. Similar to the location of Change Display Order and Export which are overall for the grid.
- For mockup of this screen see: [LINK](#)

### Manage Order Processing Options:

- Fill Order Quantity From
  - (former Fill From Source) (made into a verb phrase to indicate what can be done with that action option)
- Release to Pick File
- Release to Shipment
- Set Expected Delivery Date
- Assign Prefinish Key
  - (former 'Prefinish Assignment') (rewritten to be a verb phrase and to match detail entry. This option is being placed in the "Manage Order Processing" submenu to match detail entry as well.)
- Manage Force to Backorder
  - (former Force B/O Flag) (for clarity and simplicity, written more from a user perspective than a system perspective)
- Manage Bypass Usage
- Update EDI Item Status
- Copy Items
  - Copy and Move are being split into separate buttons in A2W, handled in another story
- Move Items
- Invoice Items
  - Possibly considering something similar for invoicing as copy and move but TBD

### Manage Price & Cost Options:

- Reprice
- Place on Price Hold
- Release from Price Hold
- Lock or Unlock Contract Billing
  - (former Contract Billing - Lock/Unlock) (made into a verb phrase)

- Override Other Charges & Costs (removed /)
- Recost
- Manage Cost Display
  - (former Specify Cost Display) (to match other A2W language)

- Manage Tax Options
  - (former Tax/No Tax Options) (written as verb phrase to indicate what can be done with that option)

Handled in another story

### Manage Additional Details:

- Manage Detail Groups
  - (former 'Assign to detail group' and 'Assign to shipping detail group' combined into 'Assign Detail Groups')

- Reorder Detail Groups
  - (former 'Group Resequence' and 'Shipping group resequence' combined into 'Reorder Detail Groups' )

- View Parent & Component List (removed /)

- Change Option Component Selections

- Print or Reprint Work Order (removed /)

- Update Incoming PO Fields

- Show On Hand & Available in Grid
  - (former Show On Hand/Available) (In Classic Agility, it was hard to tell what was happening when this option was clicked. It didn't look like anything was happening. Based on previous experiences in Agility one might assume that that option would open the On Hand summary viewer, for example, but it does not. All it does is show that qty in the grid. To help indicate this to the user, we included 'in Grid' to the menu action. The '/' slash was also replaced to follow A2W standards.)

- Question for Product: This seems kind of like an odd feature.... why wouldn't we just always show the available and on hand quantities for them since the column is already displaying?

- Answer from Product: I am sure this was a performance thing. I don't know if that is still an issue, but it is something we can look at during development to see if they can always be shown now.

## 24b Disabled Options until Selection

If the options within the More menu need a record selected in order to use them, they will be disabled until a record is selected in the grid.

- Note: The submenus are enabled and only the options within the submenu are disabled in order to match DS standards.

View Commit Information, Manage Display Order, and Export will be enabled because those don't need an item selected since they are for the overall grid.

### Future Customization

In the future, when customization is addressed, we recommend allowing users to place their most heavily used actions within the initial menu of the grid "More" menu (placing them outside of the submenu for slightly quicker access). This would be for actions like Fill Order Quantity From, Release to Pick, Release to Shipment, etc. More discussion will be needed regarding to what extent they could customize that. Perhaps they can choose 5-10 top actions to pull out of the submenu structure. This will hopefully better accommodate the QAT they had in Classic Agility. Since we can't allow this customization in the initial release, we will need to make sure these heavily used actions at least have keyboard shortcuts.

We also recommend allowing them to hide menu options they don't use, like pick files and BOM options.

## 25 Grid "More" Menu Actions

### Single Select Grid Inline

The following actions can only be taken for one line item at a time and will be placed within the row's grid "More" menu as a result.

- View Pick Files (using View instead of Display to match other A2W language)
- View Price History
- View Cross References (former Show all Cross References, thinking that the plural form of references should be indication enough)
  - Note: There is another cross reference option in Classic Agility called "Show Cross Reference" that seems to just display the cross reference column in the grid. This action is no longer needed as a menu option in A2W because of A2W's customization abilities where the user could just go choose to display the column or not. As a result, you will not see this menu option in A2W.
- Copy Work Order
- Review Backorder Allocations (made plural because there can be many allocations)

We recommend considering placing "Reallocate Inventory" in this menu as well. This was an idea that came from sales order usability testing so that users can access this important option without having to drill through. Leaving for the team to discuss. If it is not included in the initial implementation, Product thought maybe it should be added as an idea for customers to vote on.

For a brief overview of how the IA of these menus was determined, see: [Final - IA of Action Menus in Sales Orders Quotes.docx](#)

Note: There is one option left from those action menus and it is, Transaction Criteria

- See Annotation #36 to the right

## 26 Item Attribute Viewer

In Classic Agility, there is an Attribute Viewer button in the Information ribbon that allows users to search for and add items to the sales order. Since this is a way to search for and add items, for A2W, we recommend having it be an option off of the item locator.

TBD on location

Note: Elizabeth assumes that the reason it wasn't included with the item locator to begin with was because of its low usage and it was probably placed in the ribbon next to saved viewers since it is technically a viewer too.

- We will want to discuss the above thoughts with SMEs as the project gets started.

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Sales Order: 12233 X

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## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 : ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %
<input type="text"/> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>	<input type="text"/>	<input type="text"/>	\$0.00 <span style="border: 1px solid blue; padding: 2px;">UOM</span> <span style="border: 1px solid blue; padding: 2px;">Search</span>	0.00% <span style="border: 1px solid blue; padding: 2px;">Open Detail Entry</span> <span style="border: 1px solid blue; padding: 2px;">:</span> <span style="border: 1px solid blue; padding: 2px;">Add Item</span>
Available: -----			Extended Price: ----- GM: -----		
Backordered: -----			Discount: -----		
On Hand: -----			Cost: -----		
Committed: -----					

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/> <span style="border: 1px solid blue; padding: 2px;">:</span> <a href="#">OAK3C</a>		Oak Casing		3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
: Apply Payment Print Save Invoice Sales Order

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Sales Order: 12233 X

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## Sales Order: 12233

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NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 ⋮ ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Print Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

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-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Dimension	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
PLYW01 <span>🔍</span>	0.00 <span>±</span> EA <span>🔍</span>	4X8 <span>🔍</span>	3/8"X4X8'	Sheathing Plywood	\$40.00 CASE <span>🔍</span>	0.00 %	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
Available: 35.00					Extended Price: \$39.99	GM: \$0.00			
Backordered: 0.00					Discount: \$0.00				
On Hand: 30.00					Cost: \$29.99				
Committed: 25.00									

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<span>⋮</span>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
⋮ Apply Payment Print ▾ Invoice Sales Order ✓ Save

Home

Sales Order: 12233 X

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## Sales Order: 12233

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[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Dimension	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
PLYW01 <span>🔍</span>	10.00 <span>✉</span> EA <span>🔍</span>	4X8 <span>🔍</span>	3/8"X4X8'	Sheathing Plywood	\$40.00 CASE <span>🔍</span>	19.00 %	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
Available: 35.00					Extended Price: \$39.99	GM: \$76.00			
Backordered: 0.00					Discount: \$0.00				
On Hand: 30.00					Cost: \$29.99				
Committed: 25.00									

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<span>⋮</span>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)
⋮ Apply Payment Print ▾ Invoice Sales Order ✓ Save

Home

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## Sales Order: 12233

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Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
<input type="text"/> <span>🔍</span>	0.00 <span>UOM</span> <span>🔍</span>			\$0.00 <span>UOM</span> <span>🔍</span>	0.00% <span>GM</span> <span>🔍</span>	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
	Available: -----			Extended Price: -----	GM: -----			
	Backordered: -----			Discount: -----				
	On Hand: -----			Cost: -----				
	Committed: -----							

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01	Sheathing Plywood	3/8"X4X8"	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)⋮ Apply Payment Print Invoice Sales Order ✓ Save

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

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[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Length	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
1301LU	0.00 <span>CASE</span> <span>🔍</span>	10.00 <span>🔍</span>	1 in W	Hardwood Lumber	\$39.00 <span>CASE</span> <span>🔍</span>	33.00 %	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
	Available: 35.00				Extended Price: \$39.99	GM: \$1.23			
	Backordered: 0.00				Discount: \$0.00				
	On Hand: 30.00				Cost: \$29.99				
	Committed: 25.00								

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)⋮ Apply Payment Print Invoice Sales Order ✓ Save

Home

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Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 ⋮ ⚠ Prospect, Not Active, Non-Saleable ⚠ Full Payment RequiredPrint Print Edit

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Length	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
1301LU <span>🔍</span>	10.00 <span>CASE</span> <span>🔍</span>	10.00 <span>🔍</span>	1 in W	Hardwood Lumber	\$39.00 <span>CASE</span> <span>🔍</span>	33.00 %	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
Available: 35.00					Extended Price: \$39.99	GM: \$1.23			
Backordered: 0.00					Discount: \$0.00				
On Hand: 30.00					Cost: \$29.99				
Committed: 25.00									

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)⋮ Apply Payment Print Invoice Sales Order ✓ Save

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

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Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	Open Detail Entry	⋮	Add Item
<input type="text"/> <span>🔍</span>	0.00 <span>UOM</span> <span>🔍</span>			\$0.00 <span>UOM</span> <span>🔍</span>	0.00% <span>GM</span> <span>🔍</span>	<span>Open Detail Entry</span>	<span>⋮</span>	<span>Add Item</span>
	Available: -----			Extended Price: -----	GM: -----			
	Backordered: -----			Discount: -----				
	On Hand: -----			Cost: -----				
	Committed: -----							

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00
<input type="checkbox"/>	6400AK	Oak Hardwood Lumber	6/4		8.00	BF	\$11.00	\$8.30	24.55%	\$270.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)⋮ Apply Payment Print ▾ Invoice Sales Order ✓ Save

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

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-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	
1301WZ <span>🔍</span>	0.00 <span>CASE</span> <span>🔍</span>	5'X3'	White Oak Floor	\$39.00 <span>CASE</span> <span>🔍</span>	33.00 % <span>Open Detail Entry</span> <span>⋮</span> <span>Add Item</span>	
Available: 35.00				Extended Price: \$39.99	GM: \$1.23	
Backordered: 0.00				Discount: \$0.00		
On Hand: 30.00				Cost: \$29.99		
Committed: 25.00						

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C <span>⋮</span>	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01 <span>⋮</span>	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00
<input type="checkbox"/>	6400AK <span>⋮</span>	Oak Hardwood Lumber	6/4	8.00	100.00	BF	\$11.00	\$8.30	24.55%	\$270.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)⋮ Apply Payment Print Invoice Sales Order ✓ Save

Home

Sales Order: 12233

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

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[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %	
TEST-PARENT	10.00	5'X3'	White Oak Floor	\$39.00	33.00 %	<a href="#">Open Detail Entry</a>
	Available: 35.00			Extended Price: \$39.99	GM: \$1.23	
	Backordered: 0.00			Discount: \$0.00		
	On Hand: 30.00			Cost: \$29.99		
	Committed: 25.00					

## Line Items

Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>	OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>	PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00
<input type="checkbox"/>	6400AK	Oak Hardwood Lumber	6/4		100.00	BF	\$11.00	\$8.30	24.55%	\$270.00

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)

Home

Sales Order: 12233

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 Prospect, Not Active, Non-Saleable Full Payment Required

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[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %
<input type="text"/>	0.00			\$0.00	0.00%
Available: -----			Extended Price: -----	GM: -----	
Backordered: -----			Discount: -----		
On Hand: -----			Cost: -----		
Committed: -----					

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>		OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>		PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00
<input type="checkbox"/>		6400AK	Oak Hardwood Lumber	6/4	8.00	100.00	BF	\$11.00	\$8.30	24.55%	\$270.00
<input type="checkbox"/>		10AD	10oz Adhesive (12-Pack)	10oz		1.00	CASE	\$65.00	\$58.70	13.54%	\$8.80

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)

Add Non-Stock Item

Add Billing Header Item

Add Credit Memo Item

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233 &gt; Item Detail Entry

## Item Detail Entry

SO ID Customer

12233 Nevada Jones, Inc - Henderson · Ship-to #1

Manage Order Processing ▾

Manage Price &amp; Cost ▾

Manage Additional Details ▾

View Stock Status

Item

🔍
⋮

Quantity

0.00 UOM 🔍

Price

\$0.00 UOM 🔍

Extended Price

Extra

Available: -----

Discount: -----

Net Price: -----

Backordered: -----

Cost (Average): -----

On Hand: -----

Market Cost: -----

Committed: -----

Misc Cost &amp; Price: -----

Size

Item Description

GM %

0.00 %

Rebate

GM: -----

Market GM %: -----

Market GM: -----

Extended Item Description

WMS Pick From Location

Customer PO Line Number

Forced Backorder

 Force to backorder

Cover Sheet

 Set item as a cover sheet

Stock Item

 Set as stock item

Shipment Message

 Add a message to ship directly to customer

Detail Group

-----

Shipping Detail Group

-----

Extended Weight

-----

Extended Load

-----

Item Message

-----

Shipping Branch

-----

Orgil OHQ

-----

Selling Minimum Package

-----

Uncompleted Parents Available

-----

Backorder Reason

-----

Reservation for Item

× No

Discontinued

× No

× Cancel

✓ Add &amp; New

✓ Add Item



Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233 &gt; Edit Item Detail

## Edit Item Detail

SO ID

12233

Customer

Nevada Jones, Inc - Henderson · Ship-to #1

Manage Order Processing ▾

Manage Price &amp; Cost ▾

Manage Additional Details ▾

View Stock Status

Item

10AD



Quantity

10.00

Price

\$65.00

Extended Price

Available: -----

Discount: -----

Net Price: -----

Backordered: -----

Cost (Average): -----

On Hand: -----

Market Cost: -----

Committed: -----

Misc Cost &amp; Price: -----

Size

10oz

Item Description

10oz Adhesive (12-Pack)

GM %

Rebate

0.00 %

GM: -----

Market GM %: -----

Market GM: -----

Extended Item Description

Forced Backorder

 Force to backorder

Cover Sheet

 Set item as a cover sheet

WMS Pick From Location

Customer PO Line Number

Detail Group

-----

Shipping Detail Group

-----

Stock Item

 Set as stock item

Shipment Message

 Add a message to ship directly to customer

Item Message

-----

Shipping Branch

-----

Orgil OHQ

-----

Selling Minimum Package

-----

Uncompleted Parents Available

-----

Backorder Reason

-----

Reservation for Item

× No

Discontinued

× No

Cancel

Save

Home

Sales Order: 12233

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1 Prospect, Not Active, Non-Saleable Full Payment Required

546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	12/22/2024

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

Currency: USD

## Item Entry

Item	Quantity	Size	Description	Price	GM %
<input type="text"/>	0.00			\$0.00	0.00%
Available: -----			Extended Price: -----	GM: -----	
Backordered: -----			Discount: -----		
On Hand: -----			Cost: -----		
Committed: -----					

## Line Items

<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM %	GM
<input type="checkbox"/>		OAK3C	Oak Casing	3/4X3-1/2		280.00	LF	\$1.75	\$1.24	29.14%	\$142.80
<input type="checkbox"/>		PLYW01	Sheathing Plywood	3/8"X4X8'	4X8	10.00	EA	\$40.00	\$32.00	18.75%	\$75.00
<input type="checkbox"/>		6400AK	Oak Hardwood Lumber	6/4	8.00	100.00	BF	\$11.00	\$8.30	24.55%	\$270.00
<input type="checkbox"/>		10AD	10oz Adhesive (12-Pack)	10oz		1.00	CASE	\$65.00	\$58.70	13.54%	\$8.80

Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)

Add or Update with Item Order History

Add with Customer Quicklist

Add Non-Stock Item

Add Billing Header Item

Add Credit Memo Item

---

View Stock Status

View Branch Information

Fill Order Quantity From

Manage Commit

View Price & Cost Info

Reprice

Manage Detail Groups

Add or Update with Item Order History

Add with Customer Quicklist

Add Non-Stock Item

Add Billing Header Item

Add Credit Memo Item

---

View Stock Status

View Branch Information

Fill Order Quantity From

Manage Commit

View Price & Cost Info

Reprice

Manage Detail Groups

- Manage Order Processing >
  - Manage Price & Cost >
  - Manage Additional Details >
- 

View Commit Information

Manage Display Order

Export

Delete

Fill Order Quantity From

Release to Pick File

Release to Shipment

Copy Items

Move Items

Invoice Items

---

Set Expected Delivery Date

Assign Prefinish Key

Manage Force to Backorder

Manage Bypass Usage

Update EDI Item Status

Reprice

Place on Price Hold

Release from Price Hold

Lock or Unlock Contract Billing

---

Override Other Charges & Costs

Recost

Manage Cost Display

---

Manage Tax Options

Manage Detail Groups

Reorder Detail Groups

---

View Parent & Component List

Change Option Component Selections

Print or Reprint Work Order

---

Manage Incoming PO Fields

Show On Hand & Available in Grid

⋮

[View Customer Notes](#) •

[View Credit Profile](#)

[View Contacts](#)

[View Lien Information](#)

[View Tax Resale Certificates](#)

- Manage Order Processing >
  - Manage Price & Cost >
  - Manage Additional Details >
- 

View Commit Information

Manage Display Order

Export

Delete

Fill Order Quantity From

Release to Pick File

Release to Shipment

Copy Items

Move Items

Invoice Items

---

Set Expected Delivery Date

Assign Prefinish Key

Manage Force to Backorder

Manage Bypass Usage

Update EDI Item Status

Reprice

Place on Price Hold

Release from Price Hold

Lock or Unlock Contract Billing

---

Override Other Charges & Costs

Recost

Manage Cost Display

---

Manage Tax Options

Manage Detail Groups

Reorder Detail Groups

---

View Parent & Component List

Change Option Component Selections

Print or Reprint Work Order

---

Manage Incoming PO Fields

Show On Hand & Available in Grid

[Manage Order Processing](#)[Manage Price & Cost](#)[Manage Additional Details](#)[View Stock Status](#)**Item** Search More**Quantity** UOM Search**Price** UOM Search**Extended Price**

Available: -----

Discount: -----

Net Price: -----

Backordered: -----

Cost (Average): -----

On Hand: -----

Market Cost: -----

Committed: -----

Misc Cost &amp; Price: -----

**Size****Item Description****GM %**0.00 %**Rebate**

GM: -----

Market GM %: -----

Market GM: -----

**Extended Item Description****WMS Pick From Location****Customer PO Line Number****Forced Backorder** Force to backorder**Cover Sheet** Set item as a cover sheet**Stock Item** Set as stock item**Shipment Message** Add a message to ship directly to customer**Detail Group**

-----

**Shipping Detail Group**

-----

**Extended Weight**

-----

**Extended Load**

-----

**Item Message**

-----

**Shipping Branch**

-----

**Orgil OHQ**

-----

**Selling Minimum Package**

-----

**Uncompleted Parents Available**

-----

**Backorder Reason**

-----

**Reservation for Item**

× No

**Discontinued**

× No

Fill Order Quantity From

Manage Commit

Reallocate Inventory

Add to Pick File or Shipment

---

Manage Shipping Schedule

Assign Prefinish Key

View Cut File

Reserve WMS Lot Quantity

Reserve WMS Units or Select Supplier

Update EDI Item Status

Configure Work Order

**View Price & Cost Info**

**Reprice**

**View & Override Cost**

**Manage Price Records**

## Update or Add with Item Order History

---

[View Branch Information](#)

---

[Manage Detail Groups](#)

[Assign Item Cross Reference](#)

---

[View or Select Alternate Items](#)

[View or Select Complementary Items](#)

---

[View Image](#)

[Manage Item Messages](#)

[Manage Form-related UOMs](#)

[Manage Serial Numbers](#)

**View Sales Order Totals**

**View Charges and Costs**

Copy Sales Order

Move Sales Order

Cancel Sales Order

Credit Sales Order

Create Quote

Manage Transaction Criteria

View or Manage Tax Category

Capture Signature

---

Issue Refund

Open Cash Drawer

# Print Preview Acknowledgment

---

Print Acknowledgment

Print Pick Ticket

Print Delivery Ticket

Print Work Order

Print Order Proof

## Update or Add with Item Order History

---

[View Branch Information](#)

---

[Manage Detail Groups](#)

[Assign Item Cross Reference](#)

---

[View or Select Alternate Items](#)

[View or Select Complementary Items](#)

---

[View Image](#)

[Manage Item Messages](#)

[Manage Form-related UOMs](#)

[Manage Serial Numbers](#)

# Print Preview Acknowledgment

---

Print Acknowledgment

Printed

Print Pick Ticket

Print Delivery Ticket

Print Work Order

Print Order Proof

# Capture Signature



- ⓘ Ask the customer for a signature

**Signature Label for Forms**

Cancel

Save

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

Branch: Eastmond

NVJ001 · Nevada Jones, Inc - Henderson · Ship-to #1



⚠ Prospect, Not Active, Non-Saleable

⚠ Full Payment Required



546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status	Order Date	Sale Type	Customer PO	Job Number	Reference	Ship Via	Invoice Via
-----	12/11/2024	Delivery	12322-WDS	122322-sdr	122322-122	UPS Truck	-----

[Sales Order](#) [Picks & Shipments](#) [Shipping Information](#) [Payments](#) [Related Transactions](#) [Notes \(0\)](#) [Messages \(0\)](#) [More](#)

## More

[Saved Viewers](#) ▾[Doc Storage](#)[Signatures](#)[Images](#)[Remote Files](#)[EDI Forms](#)[Credit Status History](#)Order Total \$0.00 GM \$0.00 GM % 0.00% [View Totals & Charges](#)[Apply Payment](#)[Print](#) ▾[Invoice Sales Order](#)[✓ Save](#)

Home

Sales Order: 12233 X

Sales Orders &gt; Sales Order: 12233

## Sales Order: 12233

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NVj001 · Nevada Jones, Inc - Henderson · Ship-to #1



⚠ Prospect, Not Active, Non-Saleable

⚠ Full Payment Required



546 2nd Ave, Henderson NV, 89002, USA · 650-588-3657

Status

Order Date

Sale Type

Customer PO

Job Number

Reference

Ship Via

Invoice Via

-----

12/11/2024

Delivery

12322-WDS

122322-sdr

122322-122

UPS Truck

12/22/2024

[Sales Order](#)[Picks & Shipments](#)[Shipping Information](#)[Payments](#)[Related Transactions](#)[Notes \(0\)](#)[Messages \(0\)](#)[More ▾](#)

Currency: USD

## Item Entry

Item

Quantity

Size

Description

Price

GM %

 0.00  \$0.00 

0.00%

[Open Detail Entry](#)

Available: -----

Extended Price: -----

GM: -----

Discount: -----

Cost: -----

## Line Items



<input type="checkbox"/>	Action	Item	Description	Size	Dimension	Quantity/Tally	Quantity UOM	Price	Cost	GM	Available	On Hand
--------------------------	--------	------	-------------	------	-----------	----------------	--------------	-------	------	----	-----------	---------

No Line Items

To add an item to the quote, enter an item and quantity above and click "Add Item".

Order Total \$0.00 GM \$0.00 GM % 0.00%

[View Totals & Charges](#)[Apply Payment](#)[Print ▾](#)[Invoice Sales Order](#)



View Stock Status

View Price & Cost Information

View Pick Files

View Price History

View Cross References

Copy Work Order

Review Backorder Allocations

✓ Yes





Saved Viewers



Doc Storage

Signatures

Images

Remote Files

EDI Forms

Credit Status History

Default SOs - Main (Sales Order)

Invoices (Commission)

---

Add Saved Viewer

27

## Detail Entry

The flow of the detail entry experience will be different in A2W.

At a high level, users will be able to do a quick entry of an item with available inputs on the main sales order screen. If, however, they need to change additional information about that item before adding it to the order, they can click the "More" menu on the quick entry line for some additional options or click on the 'Open Detail Entry' button instead of hitting 'Add Item' for a quick add.

Clicking the 'Open Detail Entry' button will provide a drill through experience where all detail entry options can be found. The drill through page will be called 'Item Detail Entry' as the user has still not added the item to the order and are still in the entry process. Below the page title will be our standard header information detailing what SO ID and Customer this entry is for in case the user needs to use that as a quick reference.

28

## Item Detail

The inputs on this screen will closely resemble the inputs that are displayed on Classic Agility's SO Detail Entry section. (Note: Not all of these fields will display at all times for all users. This mockup is to give a general idea, though). Some changes from Classic Agility:

- Several fields are always read-only so we will display them as read-only (rather than as disabled fields) so that the user knows they cannot enable that field (for example, Cost, Discount, Ext Weight, Extended Load).
- Some of these read-only fields have also been placed as helper text under related inputs (for example, Available, Backorderd, On Hand, Committed under the Qty field and GM under the GM% field.).
- Several fields from Classic were given a label and some labels were clarified. Examples of clarified labels include:
  - "Ext price" was rewritten as "Extended Price"
  - "WMS pick from" was rewritten as "WMS Pick From Location"
  - "Selling min pack" was rewritten as "Selling Minimum Package"
  - "Uncomplited available" was rewritten as "Uncomplited Parent's Available" (based on Help Doc, needs review as I'm not sure I understood it correctly)
  - "Reservations" checkbox is read-only. Following other patterns, this will get a label of "Reservation for Item" and then have a check or x below the label.
  - The "cover sheet" checkbox will get a label. Label: "Cover Sheet" and checkbox: "Set item as a cover sheet" (based on Help Doc)
  - The "Discontinued" checkbox is read-only. Following other patterns, this will get a label of "Discontinued" and then have a check or x below the label.
  - "Cust PO line #" written out as "Customer PO Line Number"
  - The "Stock item" checkbox can be handled in a couple ways based on what the user has it set as (either editable or read-only). If editable, it will be given a label of "Stock Item" and the checkbox will say "Set as stock item". If read-only, a check or x will show below the label of "Stock Item".
  - The little (A) cost designator was brought into the "Cost" label and written out as "Cost (Average)"
  - "Ext weight" and "Ext load" were written as "Extended Weight" and "Extended Load"
  - "Shipping Branch"
  - We will give the "Force B/O" checkbox a label for consistency and alignment. Label: "Forced Backorder" and Checkbox: "Force to backorder"
  - We will give the "Apply message to ship to customer" checkbox a label for consistency and alignment. Label: "Shipment Message" and Checkbox: "Add a message to ship directly to customer" (based on Help Doc... the Classic Agility wording can be confusing because it uses "ship to customer". It is supposed to be a verb phrase saying to ship it to the customer but since we use "ship-to customer" all over Agility as a noun it can sound like it is saying to apply a message to a customer instead of saying ship it to a customer.)

In A2W, we will also be displaying the assigned detail groups as read-only fields in the detail entry screen so that users can see what they are without having to open the modal each time. Edit will still be handled in the modal accessed from the menu option, similar to the other fields for consistency. (This was a result of usability testing on quotes).

See mockup for default arrangement of fields. This will be customizable in the future.

Note: If Dimension needs to show, it will appear where Size typically is and push everything over, hopefully wrapping everything as needed. Jason said the dev team will need to play with how to get that wrapping to work as desired. Most of our customers will never experience this field. The default will be most commonly seen.

30b

## Add Non-stock/Billing Header/Credit Memo Item Access Point

Added More menu option next to item field so that users can add non-stock items, billing header items, and credit memo items from this view (if they are just doing "Add & New" for example) and to match some other screens like in Work Orders where this needed to be the access point.

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## Menu Options

Towards the upper right of this tab's content are several button/menus to handle many of the additional detail entry actions that a user can take.

The four main options will be:

- View Stock Status
- Manage Order Processing
- Manage Price & Cost
- Manage Additional Details

Which options appear under which menu can be seen in the mockups.

Note: Many of the menu options have now adopted our A2W copy standards, becoming action-oriented phrases and being rewritten for clarity. Changes are based on A2W copy standards and Help Doc references.

Note: Several of the menus are disabled and not accessible until an item is entered.

### Manage Order Processing Options:

- Fill Order Quantity From
  - (former 'Set Fill From Source' rewritten for clarity and to match other areas in A2W quotes and sales orders)
- Manage Commit
  - (former 'Specify Commit/Uncommit' was rewritten to simplify and to match other A2W copy patterns)
- Reallocate Inventory
  - (former 'Reallocate Quantities' was rewritten to match the actual window title that opens up)
- Add to Pick File or Shipment
  - (former 'Add Qty to Pick/Staging' was rewritten as 'Add to Pick File or Shipment' for clarity of what that options does and to provide consistency on terminology)
- Manage Shipping Schedule
  - (former 'Shipping/Schedule Information')
- Assign Prefinish Key
- View Cut File
  - (former "Display Cut File")
- Product recommended placing it under the Manage Order Processing submenu since it would be similar to prefinish processing in terms of "grouping like options".
- Reserve WMS Lot Quantity
  - (former 'Lot Reservation Entry' was rewritten as a verb phrase to indicate what can be done with that action option)
- Reserve WMS Units or Select Supplier
  - (former 'Unit/Supplier Reservations' was rewritten as a verb phrase to indicate what can be done with that action option)
- Update EDI Item Status
- Configure Work Order
  - (former 'View/Edit W/O Status Info' was rewritten for clarity, simplicity, and to match other wording patterns)

### Manage Price & Cost Options:

- View Price & Cost Info
  - (former 'Price and Misc Cost Info' was rewritten as a verb phrase to match other wording patterns)
- Reprice
  - (former 'Price/Discount Adjustment' was rewritten as 'Reprice' to match other windows in Classic Agility where it is called 'Reprice').
- View & Override Cost (removed /)
- Manage Price Records
  - (former 'Pricing Maintenance' was rewritten as 'Manage Price Records' to match other windows in Classic Agility where it is called 'Maintain Price Records' (but A2W is using 'Manage' instead of 'Maintain' for consistency in A2W))

### Manage Additional Details:

- 'Update or Add Via Item Order History'
  - (former Order History made into a verb phrase to tell what actions can be done with that option)
- View Branch Information
  - Note: The Branch Information icon button that appears next to the Available qty field in Classic Agility will be handled in the line item "More" menu in A2W's quick entry row in order to keep the quick entry streamlined and to place it with similar like actions, such as "View Stock Status" which is also housed there. It will be called "View Branch Information".
- Additionally, this will be an option in the Manage Additional Details Menu when in an item's detail entry screen. Similar to those other actions as well.

### Manage Detail Groups:

- View or Select Alternates
  - (former 'Alternates' was made into a verb phrase to indicate what actions can be done with that option and to match A2W copy standards)
- View or Select Complimentary Items
  - (former 'View Complementary Items' was rewritten as 'View or Select Complimentary Items' to indicate what can be done with that option and to match the alternates option)

### View Image:

- Manage Item Messages
- Manage Form-related UOMs
  - (former 'Forms UOMS' was made into a verb phrase and rephrased based on Help Doc for clarity)
- Manage Serial Numbers
  - (former 'Serial Number Entry' was made into a verb phrase to match other A2W patterns)

31

## Adding from Detail Entry

Once a user is ready to add the item to the order from this detail entry, they have two options:

1. They can simply click the 'Add Item' button and be returned to the main order screen where the item will have been added to the sales order grid and the quick entry is empty and ready for them to enter their next item

2. They can click 'Add & New'. This will add the item but rather than returning to the main order screen they will remain in the detail entry screen where the inputs will again be empty and ready for them to enter another item in the item input field.

a. Note: Jason talked with Robin and found that we will be able to show a toast message so that users know that the item was added to the order for this scenario. We want to make sure they have at least some kind of confirmation that it was successful. In Classic Agility today, they at least have that confirmation by seeing the item get added to the grid, but with this drill through experience they wouldn't have that visual confirmation so the toast is valuable.

i. The toast design will be adjusted after development has found a way to implement it.

b. Would like to track the usage of how often users click Add Item vs Add & New

For a brief overview of how the IA of these menus was determined, see: Final - IA of Action Menus in Sales Orders Quotes.docx

30b

## Item Messages Field

In Classic Agility, in the item detail, there is an Item Message field. The question for A2W is: Is the item message field needed on the Item Detail tab if the user can view those messages through an action? Note: If there are multiple messages it concatenates them and displays them as a string in this field.

• Jason is leaning towards yes that we need to keep this. This is a quick representation of what is going to be seen on forms when the messages print. He thinks we can also talk through it with the team as well to get their thoughts.

• For now, it is added as another field in the mockup.

• Note: Michelle found the following information about the Classic field seen in the screenshot to the right.

**30b Extra** **Add Non-stock/Billing Header/Credit Memo Item Access Point**

Added More menu option next to item field so that users can add non-stock items, billing header items, and credit memo items from this view (if they are just doing "Add & New" for example) and to match some other screens like in Work Orders where this needed to be the access point.

**29** **Menu Options**

Towards the upper right of this tab's content are several button/menus to handle many of the additional detail entry actions that a user can take.

The four main options will be:

- View Stock Status
- Manage Order Processing
- Manage Price & Cost
- Manage Additional Details

### Manage Order Processing Options:

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**Editing an Already Added Item**

If a user needs to update an item that has already been added to the order (and they want to update it via detail entry, not through the grid row actions), they can find the item in the grid, click on the item, which will provide a drill through experience to the detail entry screen that was outlined above. The main difference being that the page title would be 'Edit Item Detail' instead of 'Item Detail Entry' (since the item has already been entered) and the button at the bottom right would say 'Save'.

33

## Totals & Action Bar

At the bottom of the sales order screen is a totals and action bar. Both are fixed.

The totals row will show the Quote Total, the GM amount, and the GM %. The “View Totals & Charges” button is handled in another story.

Customization of what totals display will be coming. Product can determine which to show by default for the initial release. (Totals mentioned as important during usability testing included: Subtotal, tax, total, charges, GM, GM %, Cost, and balance due).

The action bar will have several buttons:

- Save (Primary)
- Invoice Sales Order (Secondary)
- Print (Secondary w/ Menu)
- Apply Payment
- “More” Menu

34

## Print Actions

The print button will house the following print options:

- See mockup

35

## Print Acknowledgment Indicator

In Classic Agility, a green checkmark appears on the print icon to indicate whether the acknowledgment has been printed yet for that order.

In A2W to show this, the word “Printed” will show to the right of the Print Acknowledgment option in the print menu if it has been printed. If not, nothing will show in that space. The “Printed” text will be right aligned and have a text color of N500.

If we receive feedback that that location of this indicator is not apparent enough for the user when on the main screen, we can come up with an alternative solution but will wait until that feedback is received.

36

## “More” Menu

The “More” menu button in the bottom action bar will house the following options:

- Copy Sales Order
- Move Sales Order
- Cancel Sales Order
- Credit Sales Order
- Create Quote
  - To be handled in another story but looking to see if we can combine the Create Quote/Cancel SO and Create Quote/Retain SO into one location/flow
- Manage Transaction Criteria
  - The Transaction Criteria option in Classic Agility is found in item detail entry and in line item grid actions, however, it does not seem to directly affect the items selected in the grid nor does it feed any of the item or sales order information into the Transaction Criteria window. It looks like it is just a link to view that window.
- As a result, for A2W, we will be separating this option out from the item action menus (since it isn’t one) and will place it as an option for the overall order.
- View or Manage Tax Category
  - See [LINK](#) for more info about the “View or Manage Tax Category” option & the “View Tax Resale Certificates” option in the Customer More menu at the top of the screen.
- Capture Signature
- Issue Refund
- Open Cash Drawer

Extra

## Capture Signature Modal

See mockup for UI

Access point described in Annotation #36

37

## POS Toggle

POS (Point of Sale) is not being addressed in this main sales order story. It will be broken out into its own story as Product would like to look at decoupling POS from Sales Orders and at making some improvements to our POS offering.

Requirements will need to be outlined by someone on the Product team and the Design team will conduct research as well to identify insights and opportunities.

38

## Display Cost Toggle

The Display Cost Toggle in the file menu of sales orders is not being addressed in this main sales order story. This toggle affects the full system, not just the sales order screen and is also repeated in Classic Agility on the main dashboard’s File menu.

Product thinks this toggle will need to be readdressed in A2W from a performance stand point.

The solution for the cost toggle can be found on this story:

<https://dmsidmsi.atlassian.net/browse/RD-2994?atlOrigin=eyJpIjoiNmE2MGNKYZA5Y2Y0NDU3MWFiM2RjMDdkMmYxNDNkYmQiLCJwIjoiaiJ9>