



Catalina Technology

Sales Central

Sales Central Capabilities

- Customer Lookup
- Order Lookup
- Customer Add/Edit
- Order Add/Edit
- Inventory Lookup

Customer Lookup

- Find customers based on a configurable search fields
- Simple listing of customers with configurable columns to help in choosing the desired customer
- View customer Detail such as credit limit, address information, etc. All customer detail fields are configurable

Search for a Customer by a keyword

Search

Customer Information

CustID: AA

Name: AAA WIGS

Attention: ATTN: RUDOLPH

Address1: 682 MORRIS TURNPIKE

City: SHORT HILLS

State, Zip: NJ NJ

Phone: 973-376-8050

Order Information

Order Number: C00021055

Status: Open

Ship Via: UPS Next Day Air

Shipping Information

ShipTo ID: 01

Name: AAA WIGS

Attention: ATTN: RUDOLPH

Address1: 682 MORRIS TURNPIKE

City: SHORT HILLS

State, Zip: NJ NJ

Phone: 973-376-8050

Ext \$	Tot Qty: 7
\$25.00	
\$386.00	
\$196.00	
\$180.00	
\$139.00	
Total Merchandise	\$926.00
Sales Tax	\$0.00
Prem Freight	\$0.00
UPS Recalc	
Misc Charges	\$0.00
Order Total	\$926.00
Payments	\$0.00
Bal Due	\$926.00

Customer Listing - Microsoft Internet Explorer

Search for Customers

CustID: AA CustName: _____

Addr1: _____ City: _____

State: _____ Zip: _____

Phone: _____ Country: _____

Customer ID	Cust Name	Addr 1
AAASHO	AAA WIGS	682 MORRIS TURNPIKE
AADDIT	A. ADDITIONS	
AAHAIR	A & A HAIR STYLIST COMPAN	788 GARRET RD
CHAABE	CHARLES BRACEY	1300 PEE DEE ROAD
CHAALF	CHARLES ALFIERI INC.	4390 N FEDERAL HWYSTE203
CITHAA	CITY HAAR WEAIVING	KURT SCHUMACHER STR 38-40
CLAACT	CLASS ACT HAIR CUTTERS	45 MAYBERRY AVE
CLAAUR	CLASSIC SOLUTION	5567 E. ASBURY AVE
FLAARG	FLORIDA HAIR CENTER	MONTEVIDEO 2903
FRAALB	FRANK ALBERT	279 MAIN STREET STE 2
HARDRI	HAARSTUDIO DRISS	SONNENSTR.23
HEAABO	SALON BRAD	1751 2ND AVE SE STE A
HEAAUS	HEAD FIRST	3115 S 1ST STREET STE B
IMAAFR	IMAN AFRICAN HAIR BRAIDS	8226 S. COTTAGE GROVE
IMAASS	IMAGE ASSOCIATES	11 EAST SALEM ST

Order Lookup

- Search by configurable fields such as Customer Number, Order Number, Invt ID, etc.
- Review Order Detail
- Review Shipper Information
- Review Payments
- Review Order Steps
- Other fields can be configured to be displayed to be viewed on the page

Search for an order for the customer

Search

Customer Information

CustID: AAASHO
 Name: AAA WIGS
 Active: Credit Limit: \$50.00
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:

Shipping Information

ShipTo ID: DEFAULT: SHORT HIL
 Name: AAA WIGS
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:
 Email:

Order Information

Order Number:
 FrtTerms:
 PO/Reference:
 Sales Rep ID: D Baker & M Cornish
 Status: Open
 Ship Via:
 Order Type:
 Buyer:

Order Listing - Microsoft Internet Explorer

OrderNumber: PONumber:

Order Number	PO Number	Date	Status	Amount
CO0021055	verbal	5/20/2004 8:31:00 AM	O	\$926.00
CO0021054	verbal	5/20/2004 8:30:00 AM	O	\$926.00
CO0021053	verbal	5/20/2004 2:45:00 AM	O	\$378.00
CO0021052	verbal	5/19/2004 3:18:00 AM	O	\$776.00
CO0021051	verbal	5/18/2004 3:22:00 AM	O	\$905.95
CO0021050	verbal	5/17/2004 5:00:00 PM	O	\$119.00
CO0021049	verbal	5/14/2004 5:45:00 AM	O	\$139.00
CO0021048	verbal	5/14/2004 5:39:00 AM	O	\$139.00

Total
 Disc
 Tax
 Weight
 Calc
 Disc
 Charges
Order Total
 Payments
 Bal Due

Customer and Order View

Customer Information

CustID: AAASHO
 Name: AAA WIGS
 Active Credit Limit: \$50.00
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8000
 Fax:

Order Information

Order Number: C00021055
 Status: Open
 FrtTerms:
 Ship Via: UPS Next Day Air
 PO/Reference: verbal
 Order Type: Custom
 Sales Rep ID: D Baker & M Cornish
 Buyer:
 Terms: COD

Shipping Information

ShipTo ID: 01:
 Name: AAA WIGS
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:
 Email:

Credit Card Information

Credit Card:
 Name on Card:
 Security Code:
 Exp. Date: January 2004
 Charge Amount: 926.00
 Use Credit Card Save card to customer

Order Detail

Order Items	Quick Entry	Misc Charges	Notes	Other		
Item #	Qty	Req Date	Unit \$	Disc	Ext \$	Tot.Qty:7
ZZYAK	1	05/20/2004	\$25.00	0.00%	\$25.00	
ZZEUFUL8	1	05/20/2004	\$386.00	0.00%	\$386.00	
ZZEURTOP5	1	05/20/2004	\$196.00	0.00%	\$196.00	
ZZXFRONT5	3	05/20/2004	\$60.00	0.00%	\$180.00	
ZXZZBOSSAAASH000451	1	05/20/2004	\$139.00	0.00%	\$139.00	

Shipments

Date/Time	Type	ShipperID
5/20/2004 8:32:00 AM	Release Administrative Hold	

Summary

Total Merchandise \$926.00
Sales Tax \$0.00
Prem Freight UPS Recalc \$0.00
Misc Charges \$0.00
Order Total \$926.00
Payments \$0.00
Bal Due \$926.00

Add/Edit/Copy an Order

- Edit an order
 - Rules can be applied on which orders can be edited (ie. Closed orders may be configured to not be editable)
- Copy an Order
 - Copying an order will duplicate the order, give it a new order number, and allow the user to edit the copy before saving
- Add an order
 - Create a new order and tie it to a customer. A new order number will be generated based on the chosen order type.

Edit an Order – Will change the order

(NOTE: you can also copy an order to a new order number)

New Customer
 New Order
 Save
 Copy Order
 Edit Order
 Cancel
 Edit Customer
 Edit Order: C00021055

Customer Information

CustID: AAASHO
 Name: AAA WIGS
 Active Credit Limit: \$50.00
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:

Order Information

Order Number: C00021055
 Status: Open
 FrtTerms:
 PO/Reference: verbal
 Ship Via: UPS Next Day Air
 Sales Rep ID: D Baker & M Cornish
 Order Type: Custom
 Terms: COD
 Buyer:

Shipping Information

ShipTo ID: 01; Change
 Name: AAA WIGS
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:
 Email:

Credit Card Information

Credit Card:
 Security Code:
 Name on Card:
 Exp. Date: January 2004
 Charge Amount: 926.00
 Use Credit Card Save card to customer

Order Detail

Item#	Qty	Request Date	Price
Edit Del ZXZZBOSSAAASHO00451	1	5/20/2004	\$139.00
Edit Del ZZYAK	1	5/20/2004	\$25.00
Edit Del ZZEUROFUL8	1	5/20/2004	\$386.00
Edit Del ZZEUROT0P5	1	5/20/2004	\$196.00
Edit Del ZZXFRONTS	3	5/20/2004	\$60.00

Item #	Qty	Req Date	Unit \$	Disc	Ext \$	Tot. Qty: 7
Edit Del ZXZZBOSSAAASHO00451	1	5/20/2004	\$139.00	0.00%	\$139.00	
Edit Del ZZYAK	1	5/20/2004	\$25.00	0.00%	\$25.00	
Edit Del ZZEUROFUL8	1	5/20/2004	\$386.00	0.00%	\$386.00	
Edit Del ZZEUROT0P5	1	5/20/2004	\$196.00	0.00%	\$196.00	
Edit Del ZZXFRONTS	3	5/20/2004	\$60.00	0.00%	\$180.00	

Shipments | Payments | Event Hist

Date/Time	Type	ShipperID
5/20/2004 8:32:00 AM	Release Administrative Hold	

Total Merchandise	\$926.00
Sales Tax	\$0.00
Prem Freight	\$0.00
UPS Recalc	\$0.00
Misc Charges	\$0.00
Order Total	\$926.00
Payments	\$0.00
Bal Due	\$926.00

Recalculate

Product Search

- Search against configurable fields to find the product you want
- Product listing can display a configurable number of columns with information required to make a product choice
- Pricing is dynamically generated depending on Solomon's pricing model.
- User can then enter quantity, price, and other configurable fields to save in the line item
- Rules can be applied to make sure that the user doesn't enter something undesirable to Solomon

Add/Edit order – product search

New Customer New Order Save Copy Order Edit Order Cancel Edit Customer
Edit Order: CO0021055

Customer Information

CustID: AAASHO
 Name: AAA WIGS
 Active Credit Limit: \$50.00
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:

Order Information

Order Number: CO0021055
 Status: Open
 FrtTerms:
 Ship Via: UPS Next Day Air
 POReference: verbal
 Order Type: Custom

Year: 2004
 Price: \$26.00

Shipping Information

ShipTo ID: 01:
 Name: AAA WIGS
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:
 Email:

Recalculate

Ext \$	Tot.Gty:7
\$139.00	
\$25.00	
\$386.00	
\$196.00	
\$180.00	
Total Merchandise	\$926.00
Sales Tax	\$0.00
Freight	\$0.00
Misc Charges	\$0.00
Order Total	\$926.00
Payments	\$0.00
Bal Due	\$926.00

Product Listing - Microsoft Internet Explorer

Search for Products

Part#: ZZ

Descr:

InvID	Product Name	Price	Class
ZZPOLYGRAPH-2	POLYGRAPH-2	\$139.00	CUSTOM
ZZPOLYGRAPH-3	POLYGRAPH-3	\$139.00	CUSTOM
ZZQUANTUM- 2	QUANTUM-2	\$139.00	CUSTOM
ZZQUANTUM- 5	QUANTUM-5	\$139.00	CUSTOM
ZZQUANTUM- 6	QUANTUM-6	\$139.00	CUSTOM
ZZQUANTUM- 6 PLUS	QUANTUM-6 PLUS	\$139.00	CUSTOM
ZZQUANTUM- 7	QUANTUM-7	\$139.00	CUSTOM
ZZQUANTUM- 7 LD	QUANTUM-7LD	\$139.00	CUSTOM
ZZQUANTUM- 8	QUANTUM-8	\$139.00	CUSTOM
ZZQUANTUM-1	QUANTUM-1	\$139.00	CUSTOM
ZZRUSH	CUSTOM RUSH (4-5 weeks)	\$20.00	CUSTOM
ZZSHANIA	SHANIA	\$195.00	CUSTOW
ZZSOPHIA	SOPHIA	\$195.00	CUSTOW
ZZSPECTRAGON	SPECTRAGON	\$139.00	CUSTOM
ZZSTAR	STAR	\$139.00	CUSTOM

Done Local intranet

Quick Item Entry

- Enter up to 15 part numbers at a time
- Good for fax/phone in orders where searching is not necessary
- Quickly add notes to each line item

Add/Edit Order - Quick Product Entry

New Customer |
 New Order |
 Save |
 Copy Order |
 Edit Order |
 Cancel |
 Edit Customer

Edit Order: C00021055

Customer Information

CustID: AAASHO
 Name: AAA WIGS
 Active: Credit Limit: \$50.00
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:

Order Information

Order Number: C00021055
 Status: Open
 FrtTerms:
 Ship Via: UPS Next Day Air
 PO/Reference: verbal
 Order Type: Custom
 Sales Rep ID: D Baker & M Cornish
 Buyer:
 Terms: COD

Credit Card Information

Credit Card:
 Name on Card:
 Security Code:
 Exp. Date: January 2004
 Charge Amount: 926.00
 Use Credit Card Save card to customer

Shipping Information

ShipTo ID: 01: Change
 Name: AAA WIGS
 Attention: ATTN: RUDOLPH
 Address1: 682 MORRIS TURNPIKE
 Address2:
 City: SHORT HILLS
 State, Zip: NJ NJ 07078
 Country:
 Phone: 973-376-8050
 Fax:
 Email:

Order Detail

Order Items			Quick Entry			Misc Charges			Notes			Other		
InvID	Qty	Notes	InvID	Qty	Notes	InvID	Qty	Notes	InvID	Qty	Notes	InvID	Qty	Notes

Shipments Payments Event Hist

Date/Time	Type	ShipperID
5/20/2004 8:32:00 AM	Release Administrative Hold	

Total Merchandise	\$926.00
Sales Tax	\$0.00
Prem Freight	\$0.00
UPS Recalc	\$0.00
Misc Charges	\$0.00
Order Total	\$926.00
Payments	\$0.00
Bal Due	\$926.00

Customer Add/Edit

- Optional configuration allows authorized users to be able to add or edit customer records
- Updates Solomon in realtime
- Edit customer information, addresses, contacts (ie. Buyers), and other configurable fields

Add/Edit Customer: Customer Header Information

New Customer |
 New Order |
 Save |
 Copy Order |
 Edit Order |
 Cancel |
 Edit Customer

Edit Customer AAASHO

Customer Information		Other Customer Information				
		Customer Info	Customer User Fields	Addresses	Contacts	
CustID	AAASHO	AR Account	1100		DfltTax	Customer
Name	AAA WIGS <small>Active Credit Limit: \$50.00</small>	SubAccount	Administration Default		CreditCard	
Attention	ATTN: RUDOLPH	PriceClass	Star Level 1		CardType	
Address1	682 MORRIS TURNPIKE	Customer Class	Key NI Account		ExpDate	1/1/1900 12:00:00 AM
Address2		Terms	COD		StmtCycle	B
City	SHORT HILLS	SalesPerson	D Baker & M Cornish		FreightTerms	
State, Zip	NJ NJ, 07078					
Country						
Phone	973-376-8050					
Fax						
Billing Address						
Name	AAA WIGS					
Attention	ATTN: RUDOLPH					
Address1	682 MORRIS TURNPIKE					
Address2						
City	SHORT HILLS					
State, Zip	NJ NJ, 07078					
Country						
Phone	973-376-8050					
Fax						
Email						

Add/Edit Customer: ShipTo Address Listing

[New Customer](#) | [New Order](#) | [Save](#) | [Copy Order](#) | [Edit Order](#) | [Cancel](#) | [Edit Customer](#)

Edit Customer AAASHO

Customer Information

CustID: AAASHO

Name: AAA WIGS

Active Credit Limit: \$50.00

Attention: ATTN: RUDOLPH

Address1: 682 MORRIS TURNPIKE

Address2:

City: SHORT HILLS

State, Zip: NJ NJ, 07078

Country:

Phone: 973-376-8050

Fax:

Other Customer Information

[Add Address](#)

	Shipto ID	Name	City	State
Edit Del	01	brian		
Edit Del	03	new one		
Edit Del	DEFAULT	AAA WIGS	SHORT HILLS	NJ

Billing Address

Name: AAA WIGS

Attention: ATTN: RUDOLPH

Address1: 682 MORRIS TURNPIKE

Address2:

City: SHORT HILLS

State, Zip: NJ NJ, 07078

Country:

Phone: 973-376-8050

Fax:

Email:

Add/Edit Customer: Add/Edit ShipTo Addresses

New Customer | New Order | Save | Copy Order | Edit Order | Cancel | Edit Customer

Edit Customer AAASHO

Customer Information

CustID: AAAASHO
Name: AAA WIGS
Active Credit Limit: \$50.00
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ NJ, 07078
Country:
Phone: 973-376-8050
Fax:

Billing Address

Name: AAA WIGS
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ NJ, 07078
Country:
Phone: 973-376-8050
Fax:
Email:

Other Customer Information

Customer Info	Customer User Fields	Addresses	Contacts
Shipto ID	NAME	Address1	
DEFAULT	AAA WIGS	682 MORRIS TURNPIKE	
Name	ATTN	Address2	
AAA WIGS	ATTN: RUDOLPH		
Attention	CITY	State, Zip	
ATTN: RUDOLPH	SHORT HILLS	NJ, 07078	
Address1	COUNTRY	PHONE	
682 MORRIS TURNPIKE		973-376-8050	
Address2	FAX	EMAIL	
City	SALESREP		
SHORT HILLS	Amy Lee		
State, Zip			
NJ, 07078			
Country			
Phone			
973-376-8050			
Fax			
Email			

Add/Edit Customer: Contacts Listing

New Customer | New Order | Save | Copy Order | Edit Order | Cancel | Edit Customer

Edit Customer AAASHO

Customer Information

CustID: AAASHO
Name: AAA WIGS
Active Credit Limit: \$50.00
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ [v] NJ, 07078
Country: [v]
Phone: 973-376-8050
Fax:

Billing Address

Name: AAA WIGS
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ [v] NJ, 07078
Country: [v]
Phone: 973-376-8050
Fax:
Email:

Other Customer Information

Customer Info | **Customer User Fields** | **Addresses** | **Contacts**

[Add Contact](#)

Shipto ID	Name	Phone
Edit 01	Batman	
Edit DEFAULT	RUDOLPH 1111	973-376-8050

Add/Edit Customer: Add/Edit Customer Contacts

New Customer | New Order | Save | Copy Order | Edit Order | Cancel | Edit Customer

Edit Customer AAASHO

Customer Information		Other Customer Information	
CustID	AAASHO	Customer Info	Customer User Fields
Name	AAA WIGS	Addresses	Contacts
Active	Active	ContactID	DEFAULT
Credit Limit	Credit Limit: \$50.00	Contact Name	RUDOLPH 1111
Attention	ATTN: RUDOLPH	Address1	682 MORRIS TURNPIKE
Address1	682 MORRIS TURNPIKE	Address2	
Address2		City	SHORT HILLS
City	SHORT HILLS	State	NJ
State, Zip	NJ NJ 07078	Zip	07078
Country		Country	US
Phone	973-376-8050	Email	
Fax		Phone	973-376-8050
		Fax	9730376080
		Type	B
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Billing Address	
Name	AAA WIGS
Attention	ATTN: RUDOLPH
Address1	682 MORRIS TURNPIKE
Address2	
City	SHORT HILLS
State, Zip	NJ NJ 07078
Country	
Phone	973-376-8050
Fax	
Email	

Add/Edit Customer: User Fields

New Customer | New Order | Save | Copy Order | Edit Order | Cancel | Edit Customer

Edit Customer AAASHO

Customer Information

CustID: AAASHO
Name: AAA WIGS
Active Credit Limit: \$50.00
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ NJ, 07078
Country:
Phone: 973-376-8050
Fax:

Billing Address

Name: AAA WIGS
Attention: ATTN: RUDOLPH
Address1: 682 MORRIS TURNPIKE
Address2:
City: SHORT HILLS
State, Zip: NJ NJ, 07078
Country:
Phone: 973-376-8050
Fax:
Email:

Other Customer Information

Customer Info	Customer User Fields	Addresses	Contacts
Internal Ref Number		User 2	
User 3		User 4	
User 5		User 6	
User 7		User 8	