



OrderDesk for Sage CRM

Feature Guide

Contents

Experience Order Entry with Sage CRM	4
Quotes and Orders.....	4
Multiple Documents and Reports.....	5
Order Search	5
Invoice Search	6
Customers	7
Unknown Customers – Default settings.....	7
Default Currency Code	7
Default Discount Level	7
Default Price List	7
Quotes Only.....	7
Order Entry	8
Billing and Shipping Addresses.....	8
Order Header	11
Order Header Optional Fields	11
Order Details	11
Order Details Optional Fields, Instructions, and Comments	13
Re-Order Line items	15
Inventory/Inventory Search	16
Price Calculation.....	17
CRM.....	17
Persons and Opportunities	17
Communications and Documents Library.....	17
CRM Users	18
Tax Calculator for Prospects	19
OrderDesk Settings Administration	19
Order Entry Settings.....	19
Countries and Regions	21
Price Calculation Settings.....	22

Inventory/Inventory Search Settings 22
System Wide Permissions Settings 22
Customer Settings 23
Application Logs 23

Experience Order Entry with Sage CRM

Conligo™ OrderDesk for Sage CRM provides your sales and customer service reps with the ability to take orders for seamless entry into Sage 300. This document intends to provide an overview of standard OrderDesk features. For assistance in configuring any of the features described below, please reach out to Conligo Support at support@conligo.ca if you have any questions.

Quotes and Orders

Convert quotes to orders, copy a quote, and copy orders, all with a single click. Ship and Invoice orders. Print customer invoices, packing slips, or quote confirmations. Permissions to allow quoting, ordering, shipping, and invoicing are all possible on a system-wide basis.

Order Entry [SAMLTD69]

Customer: (1200) Mr. Ronald Black Customer Hold: No
Current Order: ORD000000000082 Order Date: 2021-10-18 Last modified: 2021-10-18 15:53:55 Order Hold: No Order

Bill To: (Edit)
Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA
90048
USA
ATTN: Mr. Black

Ship To: (Edit)
Warehouse
Receiving Dock 17
Wabash Industrial Park
Wabash,
V3W 2H2
USA
ATTN:

Warehouse: 1 Customer PO#: PO Number Description: Description Expected Ship Date: 2021-10-18

Discount Level: Base Price List: USA Terms: Due by Invoice Date Reference: Reference

Ship Via: Cross-Country Truckir CSR: admin

UPSZONE: WHI ORDERDATE: 00000000 CREDITWARNING: NOTE: Allow greater volume WARRANTY: MAXORDER: 0

Ship Invoice
Enter search term... quantity Add Item Save View Confirmation Documents Copy Order Delete

#	SKU	Description	Quantity	UOM	Loc'n	Available	Sales Orders	On PO	Committed	Deliver By Date	Shipped	Ship Via	Unit Price	Ext Price	Action
1	A1750G	Stapler - Image-1500 Series	1	Ea.	1	50 Q	1 Q	0	0.00	2021-10-18	0	CCT Q	28.36	\$28.36	delete
2	A11030	Fluorescent Desk Lamp	1	Ea.	1	144 Q	16 Q	260 Q	0.00	2021-10-18	0	CCT Q	59.99	\$59.99	delete
													\$88.35		
													0.00		
													\$88.35		
													\$7.29		
													\$95.64		

Version: 2.0.0.0064 © 2021 - Conligo [SAMLTD69]

Figure 1 Order Entry screen

Multiple Documents and Reports

The ability to choose from a set of reports is now available as OrderDesk now supports multiple documents per document type. Order, Quote, and Invoice confirmations must be pre-configured in OrderDesk. These reports need to be in a format that is compatible with OrderDesk. Please contact your Sage 300 partner to discuss which specific reports you would like made available from the OE screen.

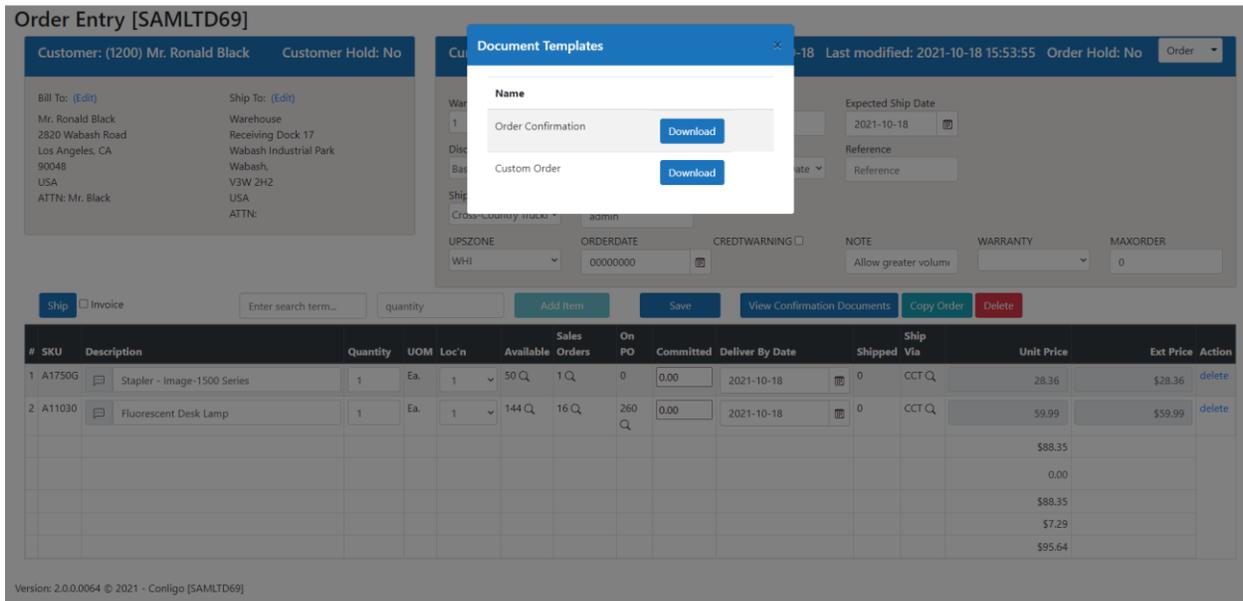


Figure 2 e.g., Multiple confirmation documents for orders

Order Search

Search for quotes and orders by customer number, order/quote number, CSR, REF#, PO#, and Warehouse.



Version: 2.0.0.0064 © 2023 - Conligo [SAMLTD69]

Order Deck

[Search Again](#)

Custom...	Order #	PO #	Ship #	Inv #	Ref #	WHS	Csr	Order D...	Status	Value	Action
Mr. Ronald Black	ORD0000000...				Ref 0901-1	4		Jan-15-2019	Entered	\$816.65	Edit
ACME Plumbing	ORD0000000...				Ref 0901-2	4		Jan-15-2019	Entered	\$3,331.62	Edit
Bargain Mart - Oakland	ORD0000000...				Ref #1006-2-2	2		Jun-30-2020	Entered	\$596.71	Edit
Mr. Ronald Black	ORD0000000...					1		Jul-01-2020	Entered	\$0.00	Edit
Mr. Ronald Black	ORD0000000...					1		Jul-01-2020	Entered	\$0.00	Edit
New Company	ORD0000000...					1		Mar-13-2013	Entered	\$899.85	Edit
Mr. Ronald Black	ORD0000000...					1	admin	Oct-18-2021	Entered	\$88.35	Edit

Page 1 of 1 1 - 7 of 7 items

Version: 2.0.0.0064 © 2021 - Conligo [SAMLTD69]

Figure 3 Sample Search Result set

Invoice Search

Search for invoices historically by CSR, Warehouse, Customer, Order Number, Invoice Number, Reference, PO Numbers, or by date range.

Search Invoices

ERP Company SAMLTD69	CSR <input type="text"/>	Warehouse Any	Customer Name <input type="text"/>	Order Number <input type="text"/>	Invoice Number <input type="text"/>
REF # <input type="text"/>	PO # <input type="text"/>	FromDate yyyy-mm-dd	ToDate yyyy-mm-dd		
<input type="button" value="Search"/>		<input type="button" value="Clear"/>			

Version: 2.0.0.0064 © 2023 - Conligo [SAMLTD69]

Invoice History

[Search Again](#)

Invoice	Invoice Date	Order #	Order Date	Customer #	Name	Ref #	WHS	Csr	Action
IN0000000000081	Apr-06-2023	1880	Apr-06-2023	1200	Mr. Ronald Black		Central warehouse - Seattle		View Invoice
IN0000000000082	Apr-06-2023	1000	Apr-06-2023	1200	Mr. Ronald Black		Central warehouse - Seattle		View Invoice
IN0000000000080	Dec-19-2022	ORD000000000107	Dec-14-2022	1200	Mr. Ronald Black		Central warehouse - Seattle		View Invoice
IN0000000000078	Dec-09-2022	ORD000000000095	May-02-2022	1200	Mr. Ronald Black		Central warehouse - Seattle		View Invoice
IN0000000000079	Dec-09-2022	ORD000000000104	Dec-09-2022	1400	Coastal Electric Company		Port of Vancouver		View Invoice
IN0000000000077	Aug-17-2022	ORD000000000096	May-02-2022	1400	Coastal Electric Company		Port of Vancouver		View Invoice
IN0000000000074	Mar-24-2022	ORD000000000079	Mar-24-2022	1890	J & Y Builders Ltd.		Central warehouse - Seattle		View Invoice
IN0000000000073	Mar-23-2022	ORD000000000078	Mar-23-2022	1970	Mr. Ronald English		Central warehouse - Seattle		View Invoice

Page 1 of 3 1 - 20 of 50 items

Version: 2.0.0.0064 © 2023 - Conligo [SAMLTD69]

Figure 4 Sample Invoice Search Result set

Customers

Unknown Customers – Default settings

Define a template customer number to allow the creation of orders for unknown customers.

Default Currency Code

The default currency code for these types of orders derives from the template customer record in Sage 300, or you can override it using the administration tool.

Default Discount Level

The default discount level for these types of orders derives from the template customer record in Sage 300, or you can override it using the administration tool.

Default Price List

The default price list for these types of orders derives from the template customer record in Sage 300, or you can override it using the administration tool.

Quotes Only

Hide the create order button on the quote screen for unknown customers if required.

Order Entry

Billing and Shipping Addresses

Add new ship-to locations and update existing billing and shipping addresses with ease. Disable the ability to edit the billing address or shipping addresses, or both using the administration tool.

Order Entry [SAMLTD69]

Customer: (1200) Mr. Ronald Black Customer Hold: No	
Bill To: (Edit)	Ship To: (Edit)
Mr. Ronald Black	MR. RONALD BLACK
2820 Wabash Road	2820 WABASH ROAD
Unit 2	Unit 2
Los Angeles, CA	LOS ANGELES, CA
90048	90048
USA	US
ATTN: Mr. Black	ATTN: MR. RONALD BLACK

Figure 5 Customer Bill-To and Ship-To

Bill To

Apply

Location/Company Name

Mr. Ronald Black

Contact Name

Mr. Black

PhoneNumber

5195555555

FaxNumber

2135557234

Email

Address

2820 Wabash Road

Unit 2

Address

Address Line 3

Address Line 4

City

Los Angeles

State or Province

CA

Country

USA

Postal Code

90048



Figure 6 Edit Bill-To

Get detailed address information quickly by clicking on the Google maps icon.

Edit shipTo ✕

Ship To Apply

MRRONB: 2820 WABASH ROAD LOS ANGELES CA 90048

266UNI: 266 UNION AVE KOMOKA ACT N0L 1R0

282WAB: 2820 Wabash Road Los Angeles CA 90048

HOME: 12 Elegant Drive Los Angeles CA 90055

MRRONB: 2820 WABASH ROAD LOS ANGELES CA 90048

WAREHS: Receiving Dock 17 Wabash CA V3W2H2

New Address

Primary Ship-To

ShipViaCode

Cross-Country Trucking Lines

Contact Name

MR. RONALD BLACK

PhoneNumber

FaxNumber

Email

ronaldblack99@hotmail.com

Address

2820 WABASH ROAD

Unit 2

Address

Address Line 3

Address Line 4

City

LOS ANGELES

State or Province

CA

Country

US

Postal Code

90048



Figure 7 Edit Ship-To Address

Get detailed address information quickly by clicking on the google maps icon.

10 | Page

Order Header

Using the administration tool, choose whether to display the following frequently used fields in the order header:

- Warehouse
- Customer PO#
- Description
- Expected Ship Date
- Discount level
- Terms
- Reference
- Tax Group
- Ship Via
- CSR
- Comment
- Price List

Order Header Optional Fields

Choose whether to display any of the optional fields configured for order headers in Sage 300.

Note: You must configure CSR as an optional field as part of the OrderDesk installation.

Order Details

Using the administration tool, choose whether to display the following frequently used fields in order details:

- Location
- Inventory Details (Available/Sales Orders/ On PO)
- Committed Quantity
- Deliver by date
- Shipped status
- Ship Via

Note: Unit of Measure is always displayed. You cannot hide it.

When inventory details are enabled, there is a dedicated column for each metric (Available, Sales orders, on PO).

#	SKU	Description	Quantity	UOM	Loc'n	Available	Sales Orders	On PO
1	A15000	 Hanging File Folder	5	Pkg.	1	50 	5 	0

Availability A15000 ✕

Availability - A15000 Hanging File Folder

Location	Name	Bin #	On Hand	Committed	Available	On Sales Order	On Purchase Order
1	Central warehouse - Seattle	0045	50	0	50	5	0
2	Portland Office	0045	0	0	0	0	0
3	Newark, New Jersey	0045	0	0	0	0	0
4	Port of Vancouver	0045	0	0	0	0	0

OnSalesOrder A15000 ✕

Expected Date	Location	Quantity	Order Number	Date	Customer #	Customer Name
2021-11-20	Central warehouse - Seattle	5.0000	ORD0000000000083	2021-11-20	1100	Bargain Mart - San Diego

Order Details Optional Fields, Instructions, and Comments

Enter comments and instructions for each order line item. Choose whether to make available for editing any of the optional fields configured for order details in Sage 300:

The screenshot displays the Sage 300 Order Desk interface for an order line item. The table has columns for #, SKU, Description, Quantity, and UOM. The first row shows item #1 with SKU A18000, Description 'Wastebasket', Quantity 1, and UOM 'Ea.'. Below the description field, there are three input fields: 'Enter comment...', 'Enter instruction...', and a dropdown menu labeled 'color'. The dropdown menu is open, showing a list of color options: Black, Blue, Brown, Burgundy, Green, Orange, Pink, Purple, Red, Tan, and White. The 'color' dropdown is currently set to 'Black'. The text 'Version: 2.0.0.006' is visible in the bottom left corner of the interface.

#	SKU	Description	Quantity	UOM
1	A18000	Wastebasket	1	Ea.

Enter comment...

Enter instruction...

color

- Black
- Blue
- Brown
- Burgundy
- Green
- Orange
- Pink
- Purple
- Red
- Tan
- White

Version: 2.0.0.006

Figure 8 e.g., Dropdown type optional field selection

Configure OrderDesk to display comments, instructions, and optional fields always or to keep them hidden until you click the comment icon.

#	SKU	Description	Quantity	UOM
1	A18000	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px;">Wastebasket</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">Enter comment...</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">Enter instruction...</div>	1	Ea.

Figure 9 Always visible Comments/Instructions and optional Fields

#	SKU	Description	Quantity	UOM
1	A18000	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px;">Wastebasket</div> </div>	1	Ea.

Figure 10 Click the comment icon to toggle visibility.

Re-Order Line items

Easily drag and drop your newly added item to the desired location in the list.

Order Entry [SAMLTD69]

Customer: (1100) Bargain Mart - San Diego
Customer Hold: No

Bill To: [\(Edit\)](#) Ship To: [\(Edit\)](#)
 Bargain Mart - San Diego Bargain Mart - San Diego
 Bargain Mart Plaza Bargain Mart Plaza
 Corner 182nd and 34th Street Corner 182nd and 34th Street
 Anytown, CA Anytown, CA
 45112 45112
 USA USA
 ATTN: Mr. Jose Grange ATTN: Mr. Jose Grange

Current Order: **NEW Order Hold: No** Order ▾

Warehouse: 1 Customer PO#: PO Number Description: Description Expected Ship Date:

Discount Level: Base Price List: WHS Terms: Net 30 Days Reference: Reference

Ship Via: Cross-Country Tru CSR: admin

UPSZONE: ORDERDATE: CREDITWARNING: NOTE: WARRANTY: MAXORDER:

Enter search term... Add Item Save Delete

#	SKU	Description	Quantity	UOM	Loc'n	Available	Sales Orders	On PO	Committed	Deliver By Date	Shipped	Ship Via	Unit Price	Ext Price	Action
1	A11030	Fluorescent Desk Lamp	1	Ea.	1	144 Q	16 Q	260 Q	0.00	2021-11-03	0	CCT Q	38.30	\$38.30	delete
2	A14000	Desk Note Book	1	Ea.	1	203 Q	0	200 Q	0.00	2021-11-03	0	CCT Q	15.75	\$15.75	delete
3	A1756G	Pencil Cup	1	Ea.	1	0	0	0	0.00	2021-11-03	0	CCT Q	5.10	\$5.10	delete
													\$59.15		
													0.00		
													\$59.15		
													\$4.88		
													\$64.03		

Version: 2.0.0.0064 © 2021 - Conligo [SAMLTD69]

Order Entry [SAMLTD69]

Customer: (1100) Bargain Mart - San Diego
Customer Hold: No

Bill To: [\(Edit\)](#) Ship To: [\(Edit\)](#)
 Bargain Mart - San Diego Bargain Mart - San Diego
 Bargain Mart Plaza Bargain Mart Plaza
 Corner 182nd and 34th Street Corner 182nd and 34th Street
 Anytown, CA Anytown, CA
 45112 45112
 USA USA
 ATTN: Mr. Jose Grange ATTN: Mr. Jose Grange

Current Order: **NEW Order Hold: No** Order ▾

Warehouse: 1 Customer PO#: PO Number Description: Description Expected Ship Date:

Discount Level: Base Price List: WHS Terms: Net 30 Days Reference: Reference

Ship Via: Cross-Country Tru CSR: admin

UPSZONE: ORDERDATE: CREDITWARNING: NOTE: WARRANTY: MAXORDER:

Enter search term... Add Item Save Delete

#	SKU	Description	Quantity	UOM	Loc'n	Available	Sales Orders	On PO	Committed	Deliver By Date	Shipped	Ship Via	Unit Price	Ext Price	Action
1	A11030	Fluorescent Desk Lamp	1	Ea.	1	144 Q	16 Q	260 Q	0.00	2021-11-03	0	CCT Q	38.30	\$38.30	delete
3	A14000	Desk Note Book	1	Ea.	1	203 Q	0	200 Q	0.00	2021-11-03	0	CCT Q	15.75	\$15.75	delete
2	A1756G	Pencil Cup	1	Ea.	1	0	0	0	0.00	2021-11-03	0	CCT Q	5.10	\$5.10	delete
													\$59.15		
													0.00		
													\$59.15		
													\$4.88		
													\$64.03		

Order Entry [SAMLTD69]

Customer: (1100) Bargain Mart - San Diego
Customer Hold: No

Bill To: [\(Edit\)](#) Ship To: [\(Edit\)](#)
 Bargain Mart - San Diego Bargain Mart - San Diego
 Bargain Mart Plaza Bargain Mart Plaza
 Corner 182nd and 34th Street Corner 182nd and 34th Street
 Anytown, CA Anytown, CA
 45112 45112
 USA USA
 ATTN: Mr. Jose Grange ATTN: Mr. Jose Grange

Current Order: **NEW** Order Hold: No Order ▾

Warehouse: 1 Customer PO#: PO Number Description: Description Expected Ship Date:

Discount Level: Base Price List: WHS Terms: Net 30 Days Reference: Reference

Ship Via: Cross-Country Tru CSR: admin

UPSZONE: ORDERDATE: CREDITWARNING: NOTE: WARRANTY: MAXORDER:

Enter search term... Add Item Save Delete

#	SKU	Description	Quantity	UOM	Loc'n	Available	Sales Orders	On PO	Committed	Deliver By Date	Shipped	Ship Via	Unit Price	Ext Price	Action
1	A1756G	<input type="text" value="Pencil Cup"/>	1	Ea.	1 ▾	0	0	0	0.00	2021-11-03	0	CCT Q	5.10	\$5.10	delete
2	A11030	<input type="text" value="Fluorescent Desk Lamp"/>	1	Ea.	1 ▾	144 Q	16 Q	260 Q	0.00	2021-11-03	0	CCT Q	38.30	\$38.30	delete
3	A14000	<input type="text" value="Desk Note Book"/>	1	Ea.	1 ▾	203 Q	0	200 Q	0.00	2021-11-03	0	CCT Q	15.75	\$15.75	delete
													\$59.15		
													0.00		
													\$59.15		
													\$4.88		
													\$64.03		

Version: 2.0.0.0064 © 2021 - Conligo [SAMLTD69]

Inventory/Inventory Search

The following settings are configurable via the administration tool:

- Line-item location override
- Allow negative inventory
- Allow inventory details to be displayed
- Default warehouse (used when no default is found on the template customer)
- Customer item numbers may be appended to a product description during order entry

For Inventory Search:

- Include non-stock items in Inventory Search
- Filter items by selected price list in Inventory Search
- Filter items by the selected warehouse in Inventory Search

Search parameters always include customer item numbers.

Price Calculation

The following settings are configurable via the administration tool:

- Price List Override
- Unit Price Override
 - Show Default Unit Price when Unit Price Override is enabled.
- Allow % Discount to line items on the calculated extended price
- Allow Flat Discount to line items on the calculated extended price
- Apply a discount to the Unit Price (before extended price calculation)
- Use the Advanced Margin calculator (requires configuration of optional fields)
 - Show the Standard Cost of an item when the Advanced Margin Calculator is enabled.
 - Use the associated Vendor Cost in place of the Standard Cost when calculating margin.
- Let Sage calculate the order taxes and total with tax (Avalara)
- Use allocation to calculate the total amount

CRM

Persons and Opportunities

Attach the CRM person from the opportunity to the order by configuring BUYERNAME, BUYERPHONE, and BUYEREMAIL optional Fields for Order Headers and enabling this feature using the administration tool.

Configure OrderDesk to set the ship-to email address and contact email address to the person on the order opportunity.

Enable OrderDesk to display a link back to the CRM Opportunity from the quote or order.

Communications and Documents Library

OrderDesk creates a record of Communication and copies printed quotes to the configured CRM PDF copy location. These are then available in the CRM documents library. If the CRM PDF copy location is not configured, documents will not be saved.

CRM

Include Opportunity Person On Order
 Yes

PDF Copy Location

CRM Rest API Url

CRM Rest API Password

[Test connection](#)

Show Link to Opportunity in Order/Quote Search Results
 Yes

Configure Default Tax Groups for Prospects
 No

Inventory Weight Units

CRM Rest API Username

Figure 11 Admin panel CRM configuration

CRM Users

Identify the CRM user that placed the order by mapping CRM users to Sage 300 users. When configured, OrderDesk will attempt to connect to Sage with the configured CRM user. Otherwise, the default user will connect. Configure CRM users using the administration tool:

[Order Entry](#) | [Other Settings](#) | [CRM Users](#) | [License](#)

Crm User Name

ERP User Name

ERP Password

[Add User Mapping](#)

CRM Username	ERP Username	ERP Password	
<input type="text" value="ADMIN"/>	<input type="text" value="ADMIN"/>	<input type="password" value="*****"/>	Remove
<input type="text" value="HEATHER"/>	<input type="text" value="HKEEP"/>	<input type="password" value="*****"/>	Remove
<input type="text" value="DARREN"/>	<input type="text" value="DARREN"/>	<input type="password" value="*****"/>	Remove

[Save Changes](#)

© 2021 - Conligo Order Desk

Figure 12 Admin panel CRM User Configuration

Tax Calculator for Prospects

When there is no AR-Customer in Sage, Order will calculate tax on the quote given the tax group assigned to the CRM Company (tax groups must be assigned in CRM). Configure the tax classes and authorities to be used by default using the administration tool. Sage 300 must have all configured tax groups. Configure this feature with the OrderDesk Admin Panel.

Default Tax Class Configuration

Create New

Tax Group Name	Tax Group	Tax Group Authority	Tax Class Authority	
Ontario Tax - Sales	ONTTAX	GST	Taxable customer	Edit Delete
Ontario Tax - Sales	ONTTAX	PST	Taxable customer	Edit Delete

© 2021 - Conligo Order Desk

OrderDesk Settings Administration

CRM Administrators are configured for access to the administration panel from their My CRM dashboard. From here, many features of the application can be managed.

Order Entry Settings

The screenshot shows the 'Application Settings' interface. At the top, there are navigation links like 'Home', 'Database Connection', 'ERP Service Connection', etc. Below that, there are tabs for 'Order Entry', 'Other Settings', and 'CRM Users'. The main content area is divided into several sections:

- Customer: (1200) Mr. Ronald Black Customer Hold: No**: Includes fields for 'Bill To' and 'Ship To' with address and contact information.
- Warehouse**: A dropdown menu for selecting a warehouse.
- Customer PO#**: A field for entering the customer's purchase order number.
- Description**: A field for entering a description of the order.
- Expected Ship Date** and **Expiry Date (Quoted)**: Fields for setting dates.
- Optional Fields**: A section with 'Add:' and 'AC (Remove):' buttons and input fields.
- Line Item Optional Fields**: A section with 'Add:' and a dropdown menu for selecting an option.
- Table**: A table with columns for #, SKU, Custom Item No, Description, QTY, UOM, Loc'n, Available, Committed, Deliver By Date, Shipped, Ship Via, Standard Cost, Margin %, Unit Price, Est Price, and Action. The first row shows a line item with SKU 'A14000' and a unit price of '\$14.95'.

Figure 13 Order settings panel

Current Order: ****NEW**** Order Hold: No

Warehouse Show

Warehouse 1

Discount Level Show

Discount Option 1

Tax groups Show

Customer PO# Show

PO Number

Price List Show

PL Option 1

Ship Via Show

Description Show

Description

Terms Show

Term Code 1

CSR Show

admin

Expected Ship Date Show

Reference Show

Reference

Comment Show

Comment

Expiry Date (Quotes) Show

Figure 14 Toggle the visibility of common order header fields.

Optional Fields:

Add:

AC (Remove)

COURIER (Remove)

Figure 15 Remove order header optional fields.

Application Settings [Save Changes](#)

Order Entry Other Settings CRM Users

Customer: (1200) Mr. Ronald Black Customer Hold: No

Bill To: (Bill)

Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA
90048
USA
ATTN: Mr. Black
 Allow Edit

Ship To: (Bill)

Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA
90048
USA
ATTN: Mr. Black
 Allow Edit
 Use CRM Person Email

Current Order: ****NEW**** Order Hold: No

Warehouse Show

Customer PO# Show

Description Show

Expected Ship Date Show

Expiry Date (Quotes) Show

Warehouse 1

PO Number

Price List

PL Option 1

Ship Via

Term Code 1

CSR

admin

Optional Fields:

Add:

AC (Remove)

COURIER (Remove)

#	SKU	Custom Item No	Description	QTY	UOM	Loc'n	Available	Shipped	Ship Via	Standard Cost	Margin %	Unit Price	Est Price	Action
1	A14800	148000	Product Name AFG_1234 Show On Label Enter comment... Enter instruction...		Ea	1	143	0	CT				\$24.95	delete

Figure 16 Add Order Header optional fields.

Application Settings [Save Changes](#)

Order Entry Other Settings CRM Users

Customer: (1200) Mr. Ronald Black Customer Hold: No

Bill To: (Bill)

Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA
90048
USA
ATTN: Mr. Black
 Allow Edit

Ship To: (Bill)

Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA
90048
USA
ATTN: Mr. Black
 Allow Edit
 Use CRM Person Email

Current Order: ****NEW**** Order Hold: No

Warehouse Show

Customer PO# Show

Description Show

Expected Ship Date Show

Expiry Date (Quotes) Show

Warehouse 1

PO Number

Price List

PL Option 1

Ship Via

Term Code 1

CSR

admin

Optional Fields:

Add:

AC (Remove)

COURIER (Remove)

Line Item Optional Fields:

---Choose an option---

BACKORDER - dropdown
COURIER - dropdown
DANGERZUS - checkbox
DEFINAMENTY - checkbox
FRIGHTMETHCD - dropdown
MANUFACTURER - text
MARKING - number
PACKER - dropdown
QUANTITY - number
SALESREP - dropdown
SIZE - text
STANDARDCOST - number
UOM - text
VOLUME - number
WARRANTYPRD - dropdown

#	SKU	Custom Item No	Description	QTY	UOM	Loc'n	Available	Shipped	Ship Via	Standard Cost	Margin %	Unit Price	Est Price	Action
1	A14800	148000	Product Name AFG_1234 Show On Label Enter comment... Enter instruction...		Ea	1	143	0	CT				\$24.95	delete

Figure 17 Configure Order Detail optional fields.

Countries and Regions

OrderDesk comes with a preconfigured list of all known ISO Country Codes and related Regions. The list can be customized based on your needs.

Country Code	Country Name	Match Expression	Customer Template	Action
AD	Andorra	^A		States/Provinces Delete Edit
AE	United Arab Emirates	^U		States/Provinces Delete Edit
AF	Afghanistan	^A		States/Provinces Delete Edit
AG	Antigua and Barbuda	^A		States/Provinces Delete Edit
AI	Anguilla	^A		States/Provinces Delete Edit
AL	Albania	^A		States/Provinces Delete Edit
AM	Armenia	^A		States/Provinces Delete Edit
AO	Angola	^A		States/Provinces Delete Edit
AQ	Antarctica	^A		States/Provinces Delete Edit
AR	Argentina	^A		States/Provinces Delete Edit
AS	American Samoa	^A		States/Provinces Delete Edit
AT	Austria	^A		States/Provinces Delete Edit
AU	Australia	^A		States/Provinces Delete Edit

Figure 18 List of Countries

Country Code	Region Code	Region Name	Customer Template	Action
CA	AB	Alberta		Delete Edit
CA	BC	British Columbia		Delete Edit
CA	MB	Manitoba		Delete Edit
CA	NB	New Brunswick		Delete Edit
CA	NF	Newfoundland		Delete Edit
CA	NS	Nova Scotia		Delete Edit
CA	NT	Northwest Territories		Delete Edit
CA	NU	Nunavut		Delete Edit
CA	ON	Ontario		Delete Edit
CA	PE	Prince Edward Island		Delete Edit
CA	QC	Quebec		Delete Edit
CA	SK	Saskatchewan		Delete Edit
CA	YT	Yukon		Delete Edit

[New](#)
[Back to Countries](#)

© 2023 - Conligo Order Desk

Figure 19 List of Country Regions for Canada

Price Calculation Settings

Price Calculation

Price List Override
 Allow

Unit Price Override
 Allow

Show Default Unit Price
 Allow

Allow % Discount (to calculated extended price)
 Allow

Allow Flat Discount (to calculated extended price)
 Allow

Apply Discounts to the Line Item calculated extended price or to the Unit Price (i.e., override the unit price)

Advanced Margin Calculator
 Use

Show Standard Cost
 Show

Use Vendor Cost As Standard Cost
 No

Use Allocation To Calculate Total Amount
 No

Read Taxes From Sage
 No Order Taxes and Total With Tax will not be displayed if enabled

Inventory/Inventory Search Settings

Inventory

Append Customer Item Number
 Allow If enabled, the customer item number will be appended to the description of the product on the line item during order entry

Line Item Location Override
 Allow

Allow Negative Inventory
 Allow

Show Inventory Details
 Allow When Show Available is enabled (see Order Entry settings), this setting toggles whether details about available inventory are shown or not

Auto Commit Quantity
 Yes

Default Warehouse

The default warehouse is derived from the template customer. If the template customer is not found, this setting is used.

Filter Items By Price List
 No

Filter Items By Warehouse
 No

Include Non Stock Items In Search
 Yes

System Wide Permissions Settings

Permissions

<p>Can Order <input checked="" type="checkbox"/> Yes</p> <p>Can Quote <input checked="" type="checkbox"/> Yes</p>	<p>Can Invoice <input type="checkbox"/> No</p> <p>Can Ship <input type="checkbox"/> No</p>
---	--

Customer Settings

Customers

<p>Template Customer Number <input type="text" value="WEBUCUST"/></p> <p>Allow Address Changes <input checked="" type="checkbox"/> Yes</p> <p>Default Discount Level <input type="text" value="Base"/></p> <p>Hide Create Order If Template Customer <input checked="" type="checkbox"/> Yes</p>	<p>Create New Customers <input type="checkbox"/> No</p> <p>Default Currency Code <input type="text" value="USD"/></p> <p><small>The default currency code is derived from the template customer. If the template customer is not found, this setting is used.</small></p> <p>Default Price List <input type="text" value="Select Default Price List"/></p> <p><small>The default price list is derived from the template customer. If the template customer is not found, this setting is used.</small></p>
--	---

Application Logs

For troubleshooting and information purposes, the Message log is the place to look for specific activity in your OrderDesk application.

[Corilog](#) [Home](#) [Database Connections](#) [ERP Service Connection](#) [Countries and Regions](#) [Application Settings](#) [Tax Classes](#) [Crystal Reports](#) [Application Logs](#) [Crm Login Test Page](#) [Disabled](#)

Message Log

Search Criteria

User Name <input type="text"/>	IP <input type="text"/>	Source <input type="text"/>
Message <input type="text"/>	Message Type <input type="text" value="INFO"/>	Limit <input type="text" value="100"/>
From Date <input type="text" value="2023-04-24"/>	To Date <input type="text" value="2023-04-25"/>	<input type="button" value="Search"/>

Figure 20 Search Criteria for logs