



Create Sales Documentation

Jennifer S - 2021-08-26 - Orders

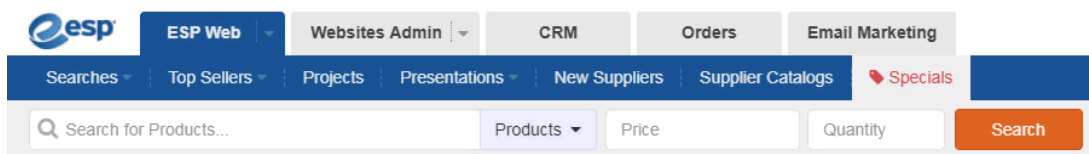
Creating Sales Documentation

What type of sales document do you want to create?

Master Order

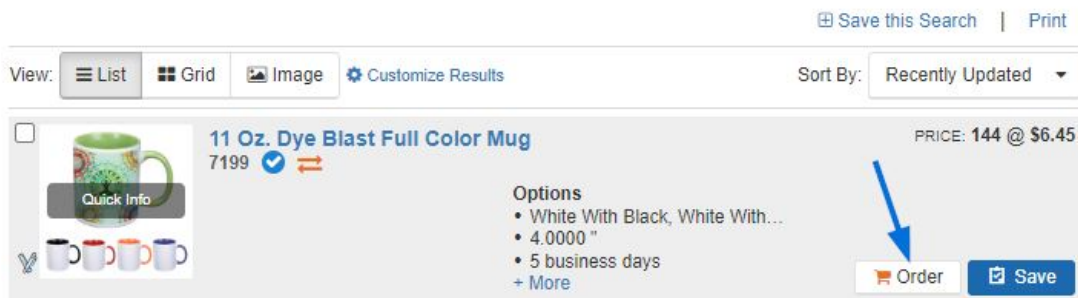
From an ESP Web Search

To create an order using a product from an ESP Web search, type a keyword or product number in the Search for Products bar and then click on the Search button.



You can also click on the [Open Advanced Search](#) link to enter additional criteria about the product, as well as use the links in the guided navigation to [narrow your results](#).

After locating the item, hover on the listing and click on the Order button.



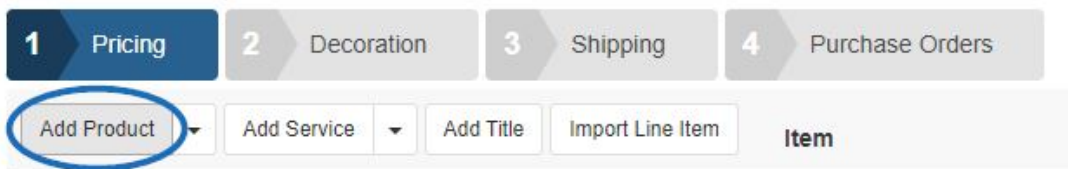
Then, you can [configure the product for ordering](#).

From the Clipboard, or Client Project

To create an order for a product that has been saved to the Clipboard or within a Client Project, click on the Orders tab and then click on the Create Order button.

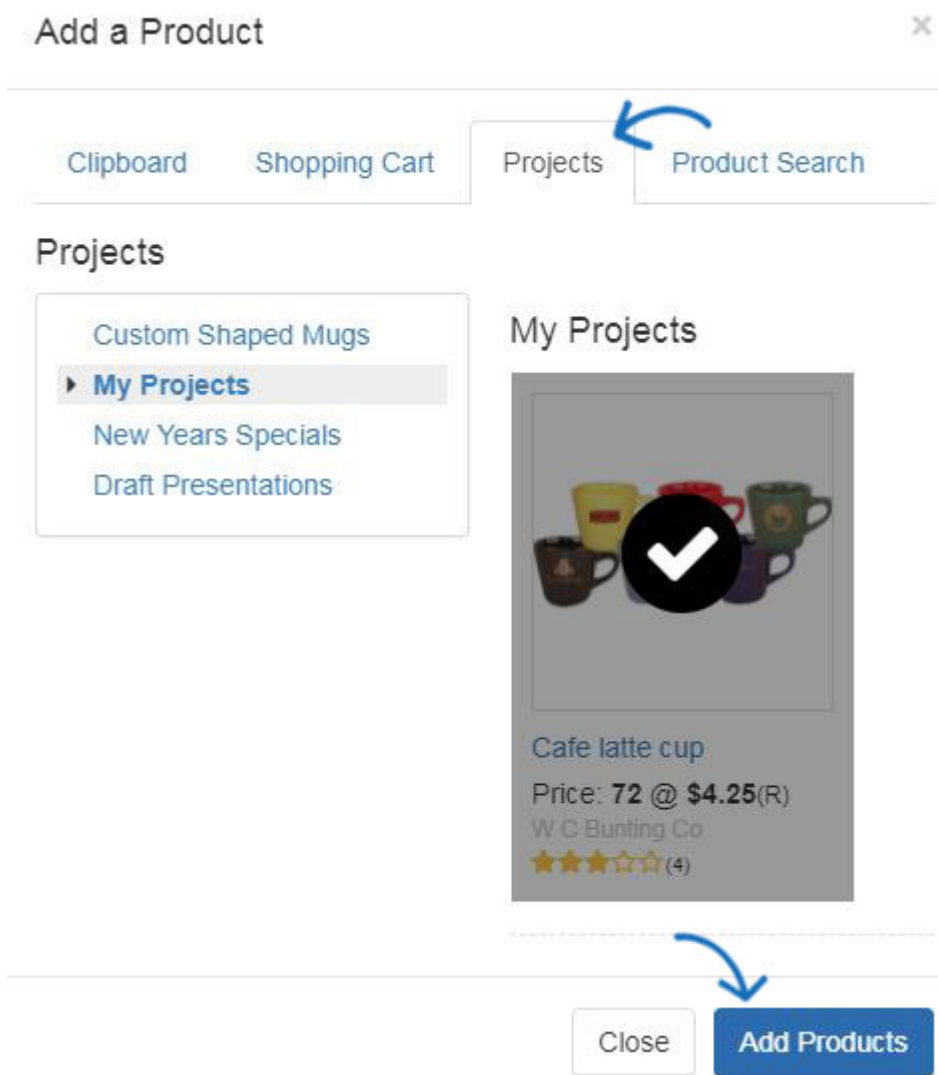


Then, in the order form, click on the Add Product button.



Tip: Add a product to your order.

Locate and select the product from the appropriate tab. Then, click on the Add Product(s) button.



From an ESP Presentation


To create an order using a product from a customer presentation, click on the CRM tab. Click on Customers and locate your customer. Then, click on the customer listing to access the details. Click on the Presentations option and locate the item you would like to use in the order.

ABC Promos Inc
 Customer
 Record Owner: ESP User Created By: ESP User

About Address Book Notes Emails Orders **Presentations** Designs

Q Search for Presentations 🔼 Newest ▾

Presentation Name: **ESP Presentation**
 Client Name: **ABC Promos Inc**
 Shared: **9/3/24**
 Created By: **ESP User**




Next, click on the Order button below the price grid.

Imprint Option: White- 1 Color Imprint

Hide White- 1 Color Imprint Edit

Show All Columns

	Quantity	72	144	288	576	1,008	2,016				
	Price \$	3.450	2.920	2.700	2.490	2.280	1.990				
	Net Cost \$ *	2.070	1.752	1.620	1.494	1.368	1.194				

* Net Cost Required

[Hide | Edit] Price Includes 1 color imprint.

Clear All Columns | Show Current Price | Update to Current Price **Save** Order

Then, you can [configure the product for ordering](#).

Generate an Order from a Quote

To generate an order from a quote, click on the Quotes tab from the ESP Orders homepage.

Quotes

Dashboard **Quotes** Orders Invoices Sample Requests Purchase Order History

Next, click on the quote number to open the quote.

<input type="checkbox"/>	Order # ⇅	Customer ⇅	Date ▾	In-Hands Date ⇅	Total ⇅	Status ⇅
<input type="checkbox"/>	ASI-455637	ABC Promos Inc	9/3/24		\$438.84	Open

Above the product listing and pricing section of the quote, click on the Create Order button.




1 Pricing	2 Decoration	3 Shipping	4 Quote Requests								Create Order
Add Product	Add Service	Add Title	Import Line Item	Item	Qty	Cost	Price	Total Cost	Total Price	Margin	Tax
 Coffee Mug Product #: 1234 C-shape handle ceramic mug, 11 oz. ASI Supplier Company asi/12345 (800) 546-1350				Black - 3.7500 */Ceramic (7125BLK)	24	\$3.4500	\$5.7500	\$82.8000	\$138.0000	40.00%	☑
				Cobalt Blue - 3.7500 */Ceramic (7125COB)	24	\$3.4500	\$5.7500	\$82.8000	\$138.0000	40.00%	☑
				Green - 3.7500 */Ceramic (7125GRN)	24	\$3.4500	\$5.7500	\$82.8000	\$138.0000	40.00%	☑

You will see a green success bar and a new order will be created. To access, edit, and send the order, return to the ESP Orders homepage. Then, click on the Orders tab. The newly generated order will be available and you can click on the order number to open the order. Then you can [complete the order form](#).

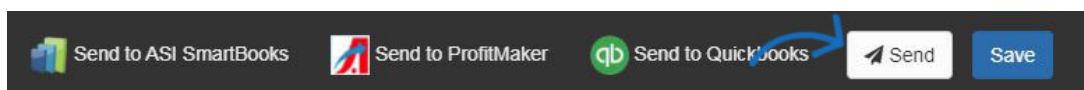
Dashboard	Quotes	Orders	Invoices	Sample Requests	Purchase Order History
<input type="text" value="Search by product, supplier, etc."/>					
Order #	Customer	Date	In-Hands Date	Total	Status
ASI-455635	ASI	5/2/24	5/24/24	\$1026.00	Open
ASI-455632	ASI	2/27/24	3/20/24	C\$690.93	Open

Purchase Order

Purchase orders can be generated from within the master order, so no re-keying is necessary. Within the order, click on the Purchase Orders tab to preview the order information.

1 Pricing	2 Decoration	3 Shipping	4 Purchase Orders								Create Invoice
Add Product	Item			Qty	Net Cost						
 ASI Supplier Company asi/12345 (800) 546-1350 Preview <input type="button" value="Send"/>	 11 Oz. Colored Stoneware Mug With C-Handle Product #: 7125 Black - 3.7500 */Ceramic (7125BLK) Material: Ceramic, Size: 3.7500 ", Product Option: Four, Product Color: Black (BLK)			24	\$3.4500						
				Total Units	24						
				Total (USD)	\$82.80						
 ASI Decorator Company Preview <input type="button" value="Send"/>	Decoration Details Set-up Charge - Silk Screen			1	\$32.0000						
				Total (USD)	\$32.00						

You can click on Preview prior to view the purchase order prior to sending. The preview will open in a new tab, once you are finished looking over the preview, close the tab to return to the order. When you are ready to email the purchase order, click on the Send button. If you are not ready to send, you can click on the Save option and will be able to send at a later time.




In the Send Your Document window, hover on the Purchase Order option and select the company for which you would like to generate the purchase order. If your order contains more than one supplier, you will be able to generate individual purchase orders for each supplier. In the example below, there are two purchase order options because the items have been set to shipped from the supplier to a decorator and then to the customer. Separate purchase orders can be generated and sent for both the supplier and decorator.


Then, click on Continue.

Send Your Document


Select the document you would like to send.



Purchase Order
Send to my supplier

Choose company ▼
 ASI Corporate
 ASI Decorator ...


Packing List
Send to my supplier

Choose company ▼


Acknowledgment
Send to my customer


Sales Order
Send to someone in my company

Continue

A preview of the purchase order will display. You can use the available options on the left to manage the sending options, including the email subject line and message. To customize the logo or email text for documentation, you can use the options in the ESP Admin section for [Document Design](#). If the PDF Attach box is checked, a PDF version of the purchase order will be attached to the email.

To *

Don't forget to add the email for Artwork, Rush, etc. in the box below.

asi@dec.com (Work) ✕

CC

ESP User ✕ MyPromoOffice ✕

BCC

Enter or Select User

Reply-To

knowledgebase4@asicentral.com

Subject *

New Purchase Order ASI-455635 from ASI Tech Training

Message


Hello,

Included is a Purchase Order. Please confirm that you have received this Order. Please note that we have indicated all net costs on this Purchase Order. If the prices listed on this PO are not correct or an item is not available, please advise us immediately.

Please "Reply All" to this email to ensure everyone is kept in the loop.

ASI Tech Training

Attach PDF



NEW
Purchase Order # **ASI-455635**
Total (USD): **\$32.00**

Order Contact	Sales Person	Order Date	In-Hand Date
Jacob Marlowe	Jacob Marlowe	05/02/2024	05/24/2024

ASI Decorator Company
7 Phoebe Ct
Rochester, NY 11779
United States
asi@dec.com
800-546-1350

Ship To
John M
4800 E Street Rd
Fayetteville-Troyes, PA 19053
United States

11 Oz., Colored Stoneware Mug With C-Handle Product #: 7125


Colored stoneware mug with C-shape handle, 11 oz.

	Quantity	Cost	Total Cost
Black - 3.7500 "Ceramic" (1125BLK)	24	\$0.00	\$0.00
White - Ceramic, Size 3.7500" Product Option: Four Product Color: Black (BLK)			
Total Units	24		
Set-up Charge - Silk Screen	1	\$32.00	\$32.00
Product Total (USD)			\$32.00


Decoration Details

Total (USD):	\$32.00
---------------------	----------------

Thank you for shopping with us!

Powered by  asi/900011

Cancel Back

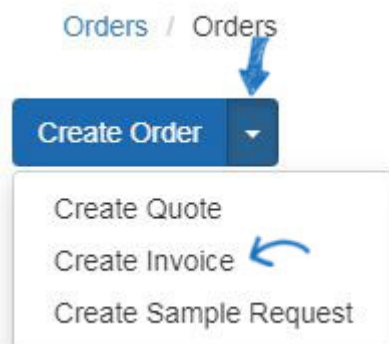
 Send

Once you have reviewed the information, click on the Send button. You are then able to review the status of the purchase order using the [Purchase Order History](#) area of ESP Orders.

Invoice

Create a New Invoice

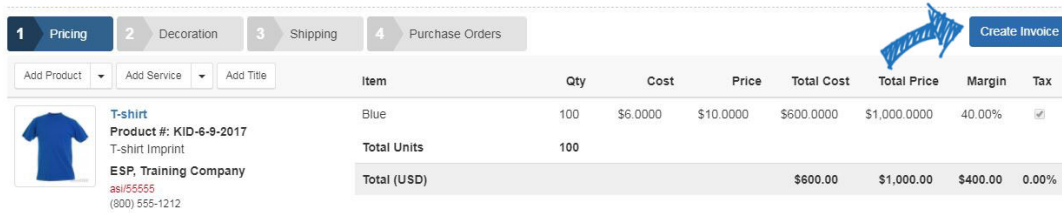
To create a new invoice, click on the arrow next to the Create Order button and select Create Invoice.




Then, begin [filling in the order form](#).

Generate an Invoice from an Existing Order

To generate an invoice from an existing order, open the order and go to the pricing area. Scroll down to where the products are listed and click on the Create Invoice button.



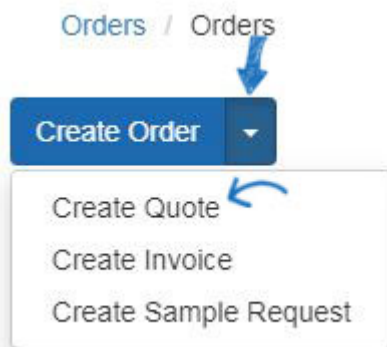
1 Pricing			2 Decoration		3 Shipping		4 Purchase Orders			
Add Product	Add Service	Add Title	Item	Qty	Cost	Price	Total Cost	Total Price	Margin	Tax
	T-shirt	Product #: KID-6-9-2017 T-shirt Imprint ESP, Training Company asi/55555 (800) 555-1212	Blue	100	\$6.0000	\$10.0000	\$600.0000	\$1,000.0000	40.00%	<input checked="" type="checkbox"/>
Total Units				100						
Total (USD)							\$600.00	\$1,000.00	\$400.00	0.00%

The Create Invoice button will open an invoice that is linked to the sales order. All of the information from the sales order will carry through to the invoice, but you are able to edit any information you like.

Quote

Create a New Quote

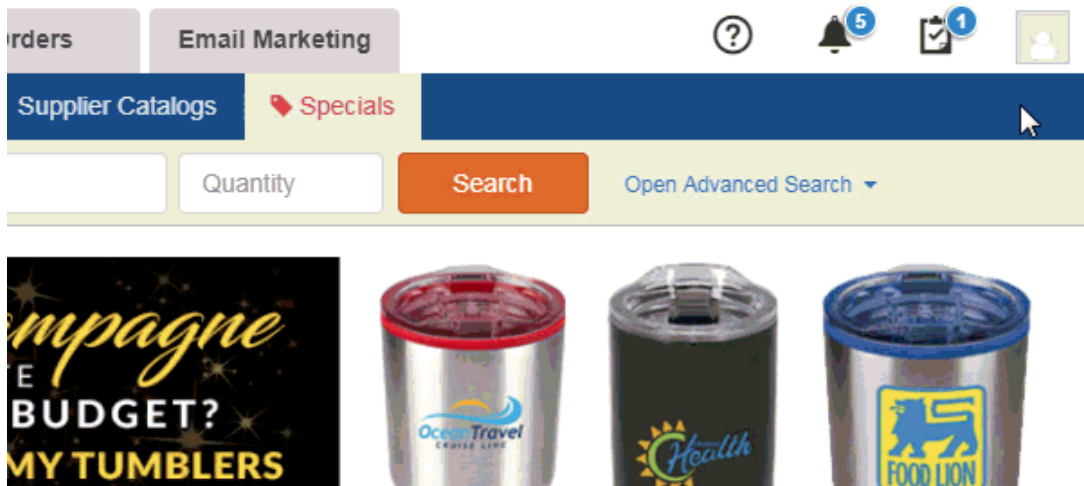
From the ESP Orders homepage, click on the arrow next to the Create Order button and select Create Quote.



Then, [fill in the order form](#).

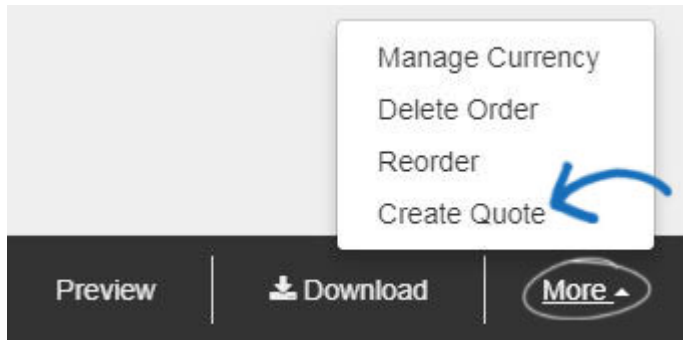
Use a Product from the Clipboard

To create a quote from the Clipboard, mark the product and then use the arrow on the Order button to select Create Quote.



Generate a Quote from an Existing Order

To create a quote from an order by clicking on the More option at the bottom of the order and selecting Create Quote from the available options.

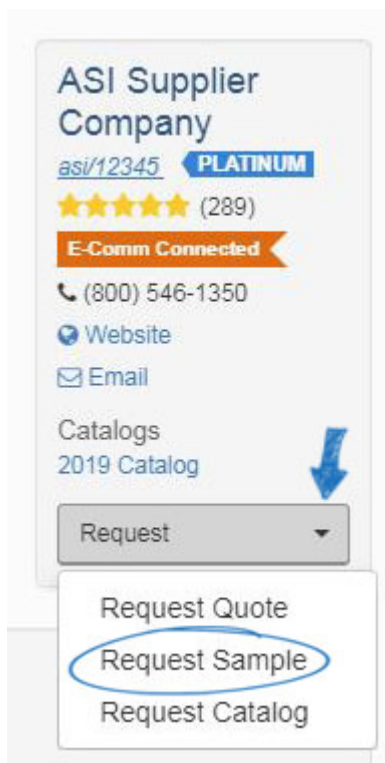


Then, [fill in the order form](#).

Sample Request

Create Sample Request from ESP Web

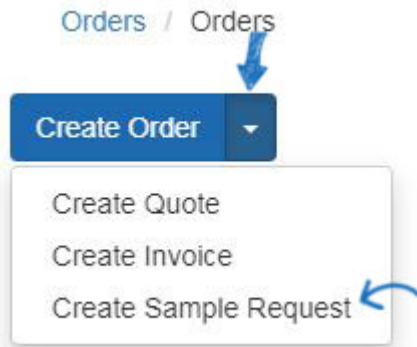
To request a sample of a product, locate the product in ESP Web. Then, click on the product name to open the detail page. On the detail page, use the arrow next to Request and select Request Sample from the dropdown.



The sample request form contains the same fields as an order. [Fill in the sample request](#) just as you would an order.

Create a New Sample Request

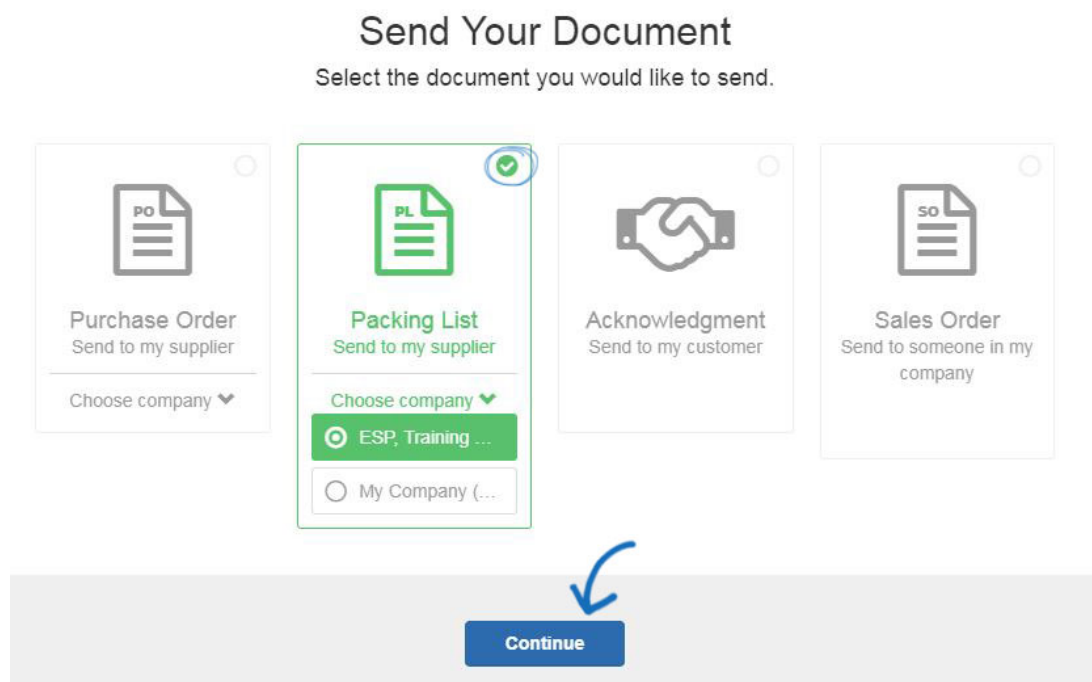
From the ESP Orders homepage, click on the arrow next to the Create Order button and select Create Sample Request.



The sample request form contains the same fields as an order. [Fill in the sample request](#) just as you would an order.

Packing List

Packing lists can be generated from a master order. After the master order has been completed, click on the Send button. Then, in the Send Your Document window, select Packing List and then click on Continue.



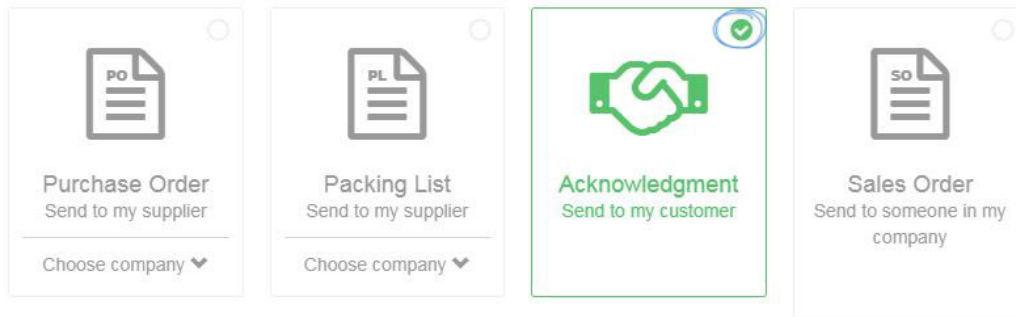
Review the email information on the send page. All fields are can be customized and a preview of the packing list will be displayed. To include a PDF attachment of the packing list in the email, check the Attach PDF box. If all of the information is correct, click on the Send button.

Acknowledgement

Acknowledgements can be generated from a master order. After the master order has been completed, click on the Send button. Then, in the Send Your Document window, select Acknowledgement and then click on Continue.

Send Your Document

Select the document you would like to send.



The interface displays four document selection cards:

- Purchase Order**: Send to my supplier. Includes a "Choose company" dropdown.
- Packing List**: Send to my supplier. Includes a "Choose company" dropdown.
- Acknowledgment**: Send to my customer. This card is highlighted with a green border and a checkmark icon in the top right corner.
- Sales Order**: Send to someone in my company.

Continue

Review the email information on the send page. All fields are can be customized and a preview of the acknowledgement will be displayed. To include a PDF attachment of the acknowledgement in the email, check the Attach PDF box. If all of the information is correct, click on the Send button.

I'm not sure.

This are the types of order documentation you can create:

- Master Order: Contains all information about the product, customer, dates, and supplier. All additional sales documentation can be generated from this document.
- Purchase Order: The sales agreement between a distributor and a supplier.
- Invoice: The list of goods and/or services rendered to the customer, including outstanding amounts owed to the distributor. Essentially, this is the bill distributors send to their customer.
- Quote: An estimation of costs for goods and/or services to be provided. Distributors can create quotes for their customers, as well as request quotes from suppliers through ESP Orders.
- Sample Request: A sales document sent from the distributor to the supplier asking for a small quantity of a product prior to placing an order.
- Packing List: A document detailing the contents of a package.
- Acknowledgement: Written confirmation detailing the specifications of the order.