

Naviteer Order Entry

Options

- Manual Entry with Primary table assistance
- Repeatable Order Entry – Copy Button
- Repeatable Order Entry – Contracts
- Automatic Order Entry – EDI (Electronic Data Interchange)
- Automatic Order Entry – CRM Opportunity to Order or Contract

Why Enter Orders?

- Accuracy
- Customer Interaction
- Business Growth

Primary Tables

The screenshot shows a 'Customer Orders' window for 'Doller Grocery'. The main table lists orders with columns for Order No., Status, Sale Date, Due Date, Date To Ship, Cust PO, Customer, Principal, Order Total, and Payment. A secondary table below shows product details for 'Bananas®' with columns for Product Code, Principal, Label, Quantity, Pack/Size, Gross Price, Sell Price, Sale Total, Disc. Total, and Spoils Total.

Primary tables are indicated by arrows:

- Red arrows point from the 'Company', 'Principals', and 'Customers' menu items to the 'Customer' and 'Principal' columns in the order list.
- Yellow arrows point from the 'Salespeople/Brokers' menu item to the 'Customer' column.
- A green arrow points from the 'Products' menu item to the 'Product Code' column in the product details table.

At the bottom right, the 'Sale Total' is displayed as \$1,030.00.

The primary tables are **Company** (normally one entry), **Principals** (also referred to as Suppliers, **Customers**, **Brokers** (salespeople) and **Principal** (Supplier) **Products**

Manual Order Entry - Header

When an order is opened for entry, section (A) is automatically filled in.

Section (B) is filled in when the customer is selected.

The freight information and dates (yellow highlighted) are entered now.

Order Will Be Added

Open Customer Order for Dairy Co. Tagged

Order Number: 3558

Order Type: Sales Order Misc.

Sale Date: 4/28/2023 Entered By: JEFF

Customer: Dairy Co. Contact: Mike Milk-Man

Customer PO#: EDI Contact: Principal:

C Payment Terms: CASH ON DELIVERY Broker: Andrew Sweigard

Shipping Address: Dairy Co. 106 The Rd Rock Port, WI 53548

Billing Address: Dairy Co. 106 The Rd Rock Port, WI 53548

Ship Via: Freight Terms: Total Weight: Due Date: Date To Ship: Delivery Time: Revised: Prior Order #: Shipped: Cancel: CW BOL:

Posted Status: Open

Note:

Principal Commission Invoice Invoice Date:

Sales Tax Amount: Shipping Amount: Sale Total: \$0.00 Commission: \$0.00

Product	Product Code	Label	Quantity	Pack/Size	Lot	Gross Price	Sell Price	Sale Total	Disc. Total	Spoils Total	Ac
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View Add Change Delete Save Cancel

Manual Order Entry - Detail

Once the Principal (Supplier) is selected and the product chosen all the information from the product is attached to the order (red boxes).

Enter the quantity (yellow highlighted), save and the order is done.

Order Will Be Added

Open Sales Memo for Dairy Co.

Order Number: 3559

Order Type: Sales Order Misc.

Sale Date: 5/01/2023 Entered

Customer: Dairy Co.

Contact: Mike Milk-Man

Customer PO#:

EDI Contact:

Principal: Dartmith

C Payment Terms: CASH ON DELIVERY

Broker: Andrew Sweigard

Shipping Address: Dairy Co.

106 The Rd

Rock Port, WI 53548

Product B 8901234

Product Will Be Changed

Customer Order Product: Product B

Product Code: 8901234 Cus Prods Principal/Supplier: Dartmith

Product: Product B Contract

Pack/Size: Case/8lb.

Ship From (FOB):

Customer Prod Code:

Total Gross Weight:

Last Change: jeff | MAY 1, 2023 | 2:39PM

Quantity In: Case 104.00

Gross Price Per: Case \$1.2300 Cost Per Case is Lock Price

Commission: Percent: 3.0000%

Amount Per Quantity:

Calculated Amount: \$3.84

Fixed Amount:

Nong

Deductions: Discount Spoils Freight Accrual

Percent / Rate: Fixed Amount: Totals:

Net Price: \$1.2300 Gross Total: \$127.92 Deductions: Sale Total: \$127.92

Print Save Cancel

Manual Order Entry – Finished Order

Not all the fields have to be filled in.

Some fields are required like sale date, customer, principal and product.

Order Will Be Added

Open Sales Memo for Dairy Co. Tagged

Order Number: **3559** Posted Status:

Order Type: Sales Order Misc. Last Add/Chg By:

Note:

Sale Date: Entered By:

Customer:

Contact:

Customer PO#:

EDI Contact:

Principal:

C Payment Terms:

Broker:

Ship Via:

Freight Terms:

Total Weight:

Due Date:

Date To Ship: Shipped:

Delivery Time: Cancel:

Revised:

Prior Order #: CW BOL:

Principal Commission Invoice

Invoice Date:

Shipping Address:

Billing Address:

Sales Tax Amount:

Shipping Amount:

\$ Sale Total: **\$127.92**

Commission: **\$3.84**

Products | Ship Instructions | Print Notes | Attach | Internal Notes | EDI Information | Accounting

Product	Product Code	Label	Quantity	Pack/Size	Lot	Gross Price	Sell Price	Sale Total	Disc. Total	Spoils Total	Ac
Product B	8901234		104.00	Case/8lb.		\$1.2300	\$1.2300	\$127.92			

View Add Change Delete Save Cancel

Repeated Orders – The Copy Button

Naviteer has a couple of ways to simplify order entry.

Once the copy button is pressed the system asks for permission to copy an order. The copied order will open for modification.

Here only a few fields (highlighted) would need to be changed.

The screenshot displays the Naviteer software interface. At the top, a window titled 'Customer Orders' shows a list of orders. The second row is highlighted in blue, with a green arrow pointing to the 'Copy' button in the right-hand sidebar. Below this, a dialog box titled 'Order Will Be Changed' is open, showing the details for copying order 3560. The dialog box contains various fields for order information, including 'Order Number', 'Order Type', 'Sale Date', 'Customer', 'Contact', 'Customer PO#', 'Principal', 'Payment Terms', 'Broker', 'Shipping Address', and 'Billing Address'. The 'Customer PO#' field is highlighted in yellow. At the bottom of the dialog box, there is a table with the following data:

Product	Product Code	Label	Quantity	Pack/Size	Lot	Gross Price	Sell Price	Sale Total	Disc. Total	Spoils Total	Ac
Product B	8901234		104.00	Case/8lb.		\$1.2300	\$1.2300	\$127.92			

At the bottom of the dialog box, there are buttons for 'View', 'Add', 'Change', 'Delete', 'Save', and 'Cancel'. The 'Save' button is highlighted with a green checkmark.

Repeated Orders – Contracts

Another way to simplify order entry is to create a contract.

The contract is a placeholder for repeated orders.

Contract entry is very similar to order entry.

Contract Will Be Changed

Sales Contract With EDI Customer

Contract #: **58**

Principal: Dartmith

Customer: EDI Customer

OR

Region:

Contact Name:

Terms: Net 30

Broker: Burt Lancaster

Ship Via: Best Way

Ship to Warehouse: My Warehouse

Use Warehouse as Ship To (print)

FOB:

POD:

Status: Active Pending Terminated Complete

Principal Commission %: 4.0000

Customer Contract No: 655

Date Entered: 3/30/2023 By: ANDREW

Contract Start Date: 3/01/2016 End: 3/31/2029

Shipping Address Billing Address

EDI Customer

Products Notes Print Note Shipping Instructions Attachments Total Amount: **\$1,251,954.00**

S	Product	Rel Qty	Quantity	Pack/Size	Contract Price	Total	Disc%	Disc Amt	Accrual%	Accn
	Product A	0	10,000	Case/4lb.	\$94.0608	\$940,608.00			4.00%	\$0
	Product B	0	10,000	Case/8lb.	\$31.1346	\$311,346.00			2.00%	\$0

Add Change Delete

Last Add/Change by: jeff | MAY 1, 2023 | 3:26PM

Save Cancel

Repeated Orders – Contracts

Creating a release (which is an order) can be done in bulk or one at a time.

All the information from the contract passes to the order.

Like the copy button, very few fields must be changed.

The screenshot displays two overlapping windows. The top window, titled 'Customer Contracts', shows a table with columns: S, T, <-Contract #>, Customer, Region, Purchase From, Comp, Purchase For, Cus Cont No, and Start Date. The bottom window, titled 'Contract Product Sales', shows a table with columns: <-Order#>, Status, Region, Sale Date, Due Date, Contract, PO Number, Customer, Broker, Product, Code, Qty, Pack/Size, Gross Price, and Sales. A summary box at the bottom of the 'Contract Product Sales' window shows: Contract Quantity: 10,000; Minus Quantity Sold: 2,784; Quantity Left: 7,216; Sales Total: \$255,045.84. A right-hand menu contains sections for 'Contracts' (Add, Change, Delete, Copy) and 'Products' (Add, Change, Delete, Create Releases, Show Releases, Top Ten Customers). A yellow arrow points to the 'Create Releases' button.

S	T	<-Contract #>	Customer	Region	Purchase From	Comp	Purchase For	Cus Cont No	Start Date
S		58	EDI Customer		Dartmith	Navite		655	3/01/2016

<-Order#>	Status	Region	Sale Date	Due Date	Contract	PO Number	Customer	Broker	Product	Code	Qty	Pack/Size	Gross Price	Sales
3,546	Comple		6/10/2031		58	151-4200-401	EDI Custor		Product A	1234567	696	Case/4lb.	\$97.9800	\$9
3,544	Comple		6/10/2031		58	151-4200-400	EDI Custor		Product A	1234567	696	Case/4lb.	\$97.9800	\$9
2,499	P.O. Ne		6/10/2031	6/15/2022	58	151-4200-400	EDI Custor		Product A	1234567	696	Case/4lb.	\$97.9800	\$9
2,498	Open		6/10/2031	6/15/2022	58	151-4200-401	EDI Custor		Product A	1234567	696	Case/4lb.	\$97.9800	\$9

Contract Quantity: 10,000
Minus Quantity Sold: 2,784
Quantity Left: 7,216 Sales Total: \$255,045.84

Automatic Order Entry - EDI

Receiving POs by EDI can eliminate all manual order entry.

The order is brought over from the VAN (Value Added Network) and processed into an order.

The highlighted order was processed by EDI with no manual entry.

Customer Orders

Customer Order: EDI Customer Shipped, Not Invoiced: 0

Search: X Queries: All Records Include Posted

<-Order No>	T	Status	Sale Date	Due Date	Cust PO	Customer	Principal	Order Total	Payment Terms	Freight Terms	Ship Weight
3538	B	Open	4/21/2023		765023485	Grocery Store 0001	Fruit Co	\$65,020.00	CASH IN ADVAN		1575130
3533	B	Open	4/03/2023		12459	Dairy Co.	Fruit Co	\$62,454.00	CASH ON DELIV		434,486
3532	B	Open	3/29/2023		999	Grocery Store 4589	Fruit Co	\$6,645.91	UPON RECEIPT		291,178
3531	B	Open	8/10/2023		12454	Dairy Co.	Fruit Co	\$62,454.00	CASH ON DELIV		434,486
3530	B	Open	3/30/2023		12453	Dairy Co.	Fruit Co	\$62,454.00	CASH ON DELIV		434,486
3529	B	Open	3/28/2023		73894	Grocery Store 4589	Fruit Co	\$12,000.00	UPON RECEIPT		18,000
2499	B	P.O. Ne	6/10/2031	6/15/2022	151-4200-40	EDI Customer	Dartmith	\$76,269.92	ROG 30	Prepaid	
2498	B	Open	6/10/2031	6/15/2022	151-4200-40	EDI Customer	Dartmith	\$76,269.92	ROG 30	Prepaid	
2488		Open	3/10/2023		78492	Miguel's Mexican		\$3,625.40	CASH ON DELIV		14,400
2487		Open	3/09/2023		A4572	Dairy Co.		\$10,058.00	CASH ON DELIV		6,996

<+Product>	Product Code	Label	Quantity	Pack/Size	Gross Price	Sell Price	Sale Total	Disc. Total	Spoils Total	Accrual
Product A	1234567		696.00	Case/4lb.	\$97.9800	\$91.6113	\$63,761.46		\$1,704.85	\$2,727
Product B	8901234		408.00	Case/8lb.	\$31.7700	\$30.6580	\$12,508.46		\$194.45	\$259

Principal: Dartmith

Sale Total: **\$76,269.92**
 Commission: **\$7,682.16**

Customer Orders

- Add
- Change
- Delete
- View
- Copy
- Cancel/Reopen
- View EDI File

Products

Print

Sales Memo or Order

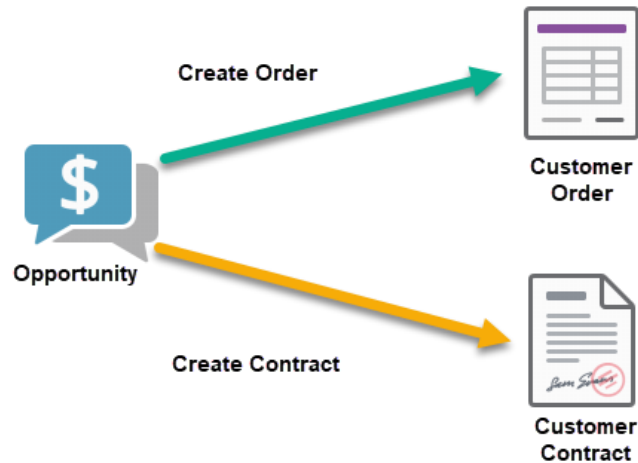
Send To

Accounting

Search

Automatic Order Entry – CRM to Orders/Contracts

CRM now has a feature where an order or contract can be created directly from a sales opportunity.



The screenshot shows the 'Sales Opportunities' window in a CRM system. The main window displays a table of sales opportunities. The selected opportunity is highlighted in blue. Below the main table, there is a detailed view of the selected opportunity, including a 'Products' table and an 'Action Log' table. The 'Opportunity Value' is displayed as \$3,600.00. A yellow arrow points from the 'Create Order/Contract' button in the right-hand sidebar to the 'Ground Onion' product row in the 'Products' table.

Number	Company	Contact	Sales Rep	Principal	Description	Value	C	Start	Target
1	My Sales Prospe	Bob		The Garlic	Garlic: 20,00			1/01/1900	10/05/20
2	Canada Prospect	Michael E		Mushroom	Mushrooms			1/01/1900	9/30/201
3	Canada Prospect	Michael E	Jeff Antor	The Garlic	Dehydrated	\$3,600.00		1/01/2024	1/01/202
4	Canada Prospect	Michael E		The Garlic	Ground Onio			1/01/1900	12/17/20
5	My Sales Prospe	Bob		Dressing	Italian Salac			1/01/1900	10/25/20
13	Eastern Vegetabl		Andrew S	Michael F	Mushrooms			5/19/2020	5/22/202
14	AMERICHICKEN	Steve Ro	Andrew S	Dressing	F Opportunity			4/24/202	5/21/202
15	AMERICHICKEN	Steve Ro	Andrew S	Dressing	F Opportunity	\$1,500.00		1/1/2024	2/20/202

Product	Principal	Qty	Pack/Size	Unit Price	Start Date	End Date	Action
Ground Onion	The Garlic	1,200		\$3.0000	10/19/2020	10/19/2020	Email Followup

Why Enter Orders?

- Accuracy
 - If the orders are only going from the customer to the supplier, you may not receive all the order brokerage due you. In some cases, the supplier may decide to bypass your sales efforts completely to save the brokerage costs. Most brokers do not have a written agreements with their suppliers.
- Customer Interaction
 - If the orders are received by the broker and passed on to the supplier, the customer has more interaction with the broker and likely to purchase other products the broker has to offer. Most broker sales to customers are not from just one supplier. The supplier also sees the broker actively pursuing and increasing their business. The broker has greater value in the eyes of the supplier.

Why Enter Orders?

- Business Growth
 - One of the best benefits of tracking orders is the ability to study sales reports on business progress. As the business grows, the broker can track sales by customer and supplier with ease.
 - The broker may know when a product is not being pulled by a customer well before the supplier is informed of an issue. This allows the broker to interact with the customer to determine courses of action and salvage supplier/customer relations.
 - Since reporting shows the trends by customer and supplier, the broker can review sales trends and recommend product options to both the supplier and customer
 - Naviteer has a white papers with more information on this and other subjects of interest to food brokers.