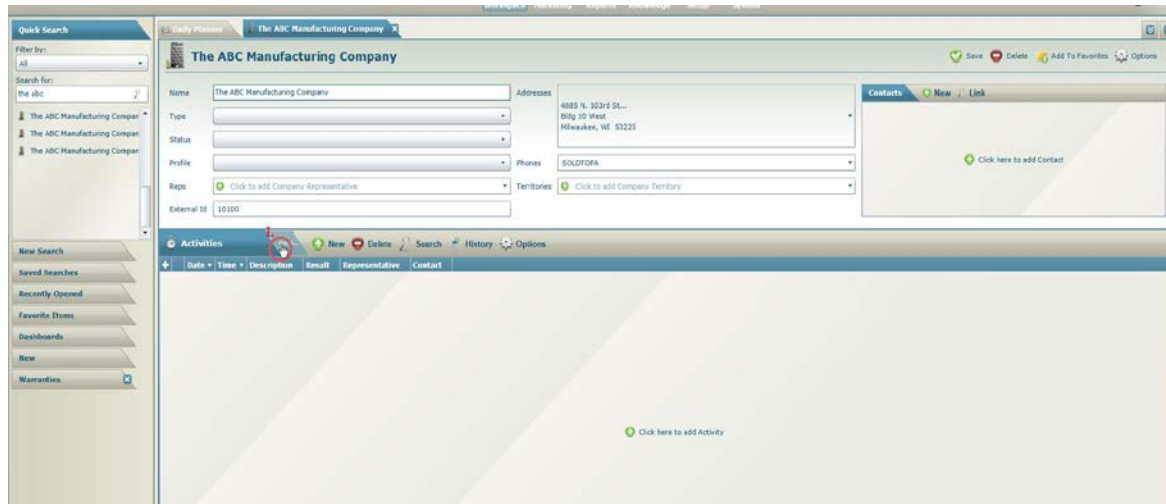
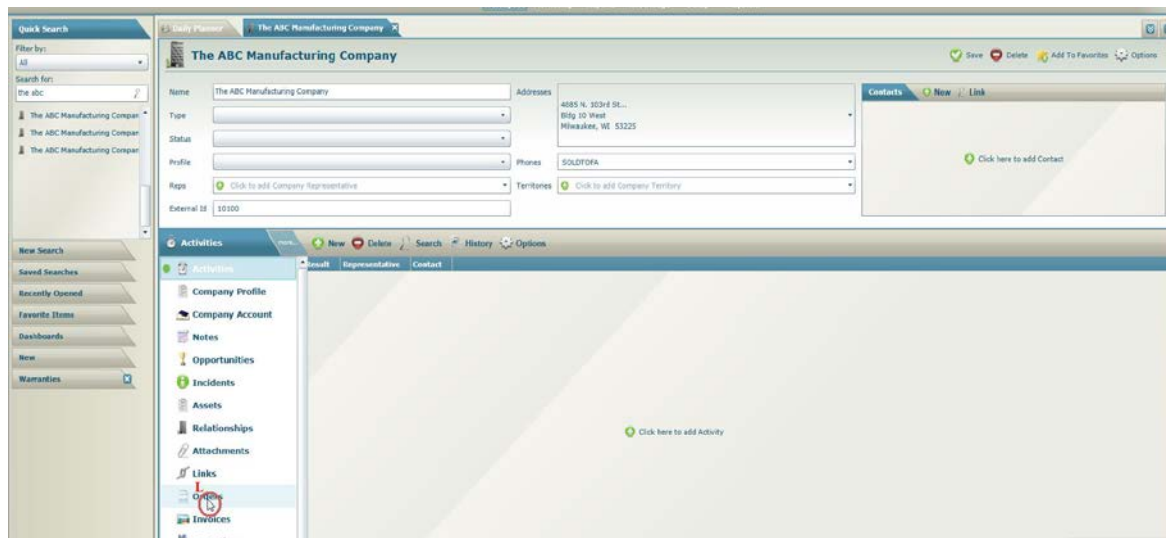


## RB-ERP Tabs on Customer Record

1. There are several tabs available from the Company record, designed to display data from RB-ERP. Click More.



2. Click Orders.



## RB-ERP Tabs on Customer Record

3. All the Orders for this Company are displayed. You can click to open any Order.

**Company Information:**

- Name: The ABC Manufacturing Company
- Address: 4885 N. 303rd St., Bldg 10 West, Milwaukee, WI 53225
- Phones: SOLDFORA
- Reps: Click to add Company Representative
- External ID: 10100

**Orders Table:**

Order Number	Type	Order Date	PO Number	Status	Sales Rep	Manager/Percent
51	Written Order	11/4/2012	HDR-110412-1	A	Harry Moesian	
56	Written Order	11/5/2012		A	Harry Moesian	
37	Invoice - One Step	11/5/2012		A	Harry Moesian	
251	Written Order	1/25/2013		A	Harry Moesian	
270	Written Order	2/21/2013		A	Harry Moesian	
296	Written Order	2/18/2013	DCG16	A	Harry Moesian	
300	Written Order	2/26/2013		A	Harry Moesian	
304	Written Order	2/26/2013		A	Harry Moesian	
318	Written Order	4/15/2013		A	Harry Moesian	
319	Written Order	4/15/2013		A	Harry Moesian	
579	Written Order	10/22/2013		A	Harry Moesian	
581	Written Order	10/30/2013		A	Harry Moesian	
590	Written Order	11/11/2013		A	Harry Moesian	
630	Written Order	11/18/2013		A	Harry Moesian	
653	Written Order	11/25/2013		A	Harry Moesian	
668	Written Order	11/28/2013	WW	A	Harry Moesian	
	Written Order	12/4/2013	DCG TEST FOR 348	A	Harry Moesian	

4. The Order details are shown, including the Order Lines.

**Order Details:**

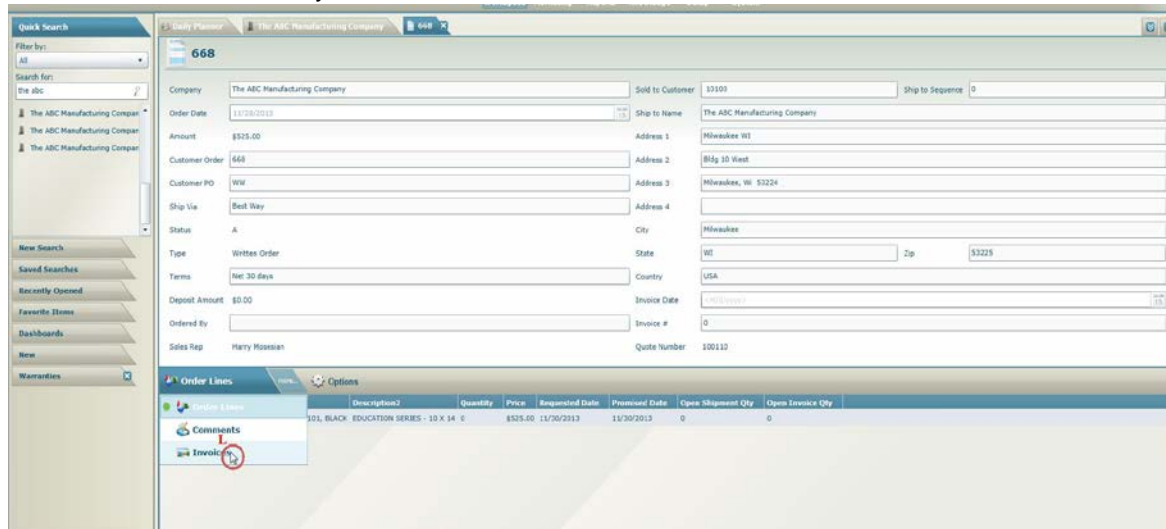
- Company: The ABC Manufacturing Company
- Order Date: 11/28/2013
- Amount: \$525.00
- Customer Order: 668
- Customer PO: WW
- Ship Via: Best Way
- Status: A
- Type: Written Order
- Terms: Net 30 days
- Deposit Amount: \$0.00
- Ordered By: [Blank]
- Sales Rep: Harry Moesian
- Sold to Customer: 10100
- Ship to Name: The ABC Manufacturing Company
- Address 1: Milwaukee WI
- Address 2: Bldg 10 West
- Address 3: Milwaukee, WI 53224
- Address 4: [Blank]
- City: Milwaukee
- State: WI
- Zip: 53225
- Country: USA
- Invoice Date: 11/28/2013
- Invoice #: 0
- Quote Number: 100110

**Order Lines Table:**

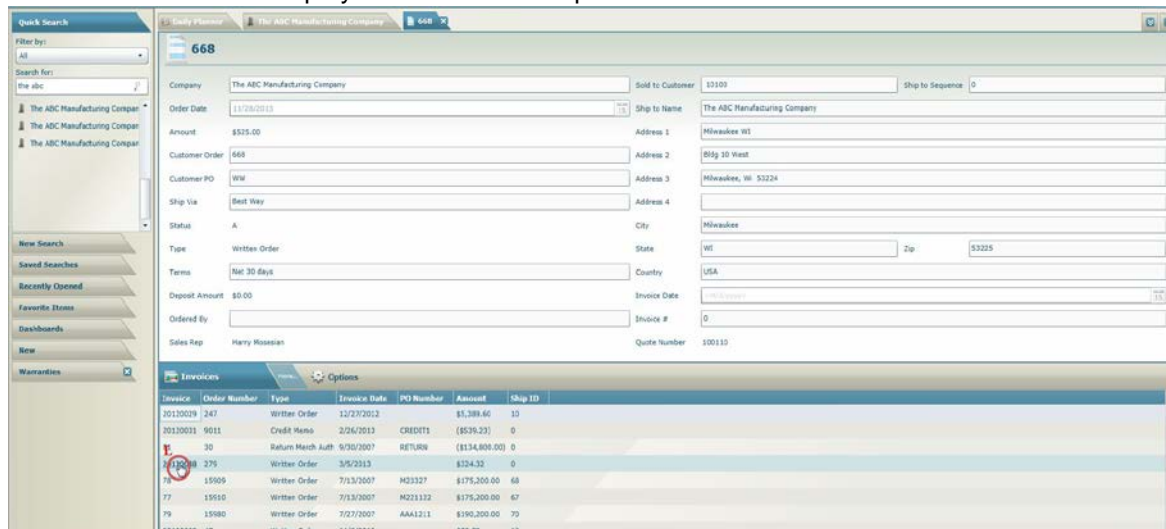
Line #	Item	Description	Description2	Quantity	Price	Requested Date	Promised Date	Open Shipment Qty	Open Invoice Qty
1	100-10110	PROJECTOR, OVRNG, 101, BLACK	EDUCATION SERIES - 10 X 14	5	\$525.00	11/20/2013	11/30/2013	0	0

## RB-ERP Tabs on Customer Record

5. From the Order screen you can also view Notes or Invoices for the Order.



6. All the Invoices are displayed. You can also open the Invoice records to see more details.



## RB-ERP Tabs on Customer Record

7. From the Invoice screen you can also view any comments that may have been added in RB-ERP.

The screenshot shows the '20120038' invoice screen. The 'Comments' tab is selected and highlighted with a red circle. The invoice details include:

- Order:** Sold-To: Manufacturing Ltd., Order Date: 1/5/2013, Amount: \$324.32, Order Number: 279, PO Number: [blank], Ship Via: UPS Blue, Status: A, Type: Written Order, Terms: Net 30 days, Deposit: \$0.00, Ordered By: Tony J. Adams.
- Ship To:** Manufacturing Ltd., 4550 Mainline Highway, Alberta, Canada 9856-6666, City: Calgary, Zip: 9856-6666, Ship # 0, Ship Date: 1/5/2013, Invoice # 20120038, Invoice Date: 1/5/2013.

The 'Invoice Lines' table shows:

Invoice Line	Total Inv.	Ext. Inv.
INV/USDC INVOICES CAD9500.00 CAD9500.00	\$324.32	

8. From the Company record you can also display any Quotations linked to this Company.

The screenshot shows the 'The ABC Manufacturing Company' record. The 'Orders' tab is selected, displaying a list of orders. The 'Quotations' link is highlighted in red. The company details include:

- Name:** The ABC Manufacturing Company
- Address:** 4805 N. 103rd St., Bldg 10 West, Milwaukee, WI 53225
- Phones:** SOLDTQFA
- External Id:** 10100

The 'Orders' table shows:

Order Date	PO Number	Status	Sales Rep.	Margin/Percent
4/2012	HOM-110412-1	A	Harry Mosesian	
5/2012		A	Harry Mosesian	
5/2012		A	Harry Mosesian	
5/2013		A	Harry Mosesian	
1/2013		A	Harry Mosesian	
8/2013	DCG10	A	Harry Mosesian	
6/2013		A	Harry Mosesian	
9/2013		A	Harry Mosesian	
5/2013		A	Harry Mosesian	
5/2013		A	Harry Mosesian	
22/2013		A	Harry Mosesian	
30/2013		A	Harry Mosesian	
11/2013		A	Harry Mosesian	
18/2013		A	Harry Mosesian	
25/2013		A	Harry Mosesian	
28/2013	WW	A	Harry Mosesian	
4/2013	DOG TEST FOR 3HB	A	Harry Mosesian	
4/2013		A	Harry Mosesian	
4/2013		A	Harry Mosesian	

## RB-ERP Tabs on Customer Record

9. Click to open any Quotation.

The screenshot shows the 'The ABC Manufacturing Company' record. The 'Quotations' tab is selected, displaying a table with columns: Quotation #, Description, Status, Type, Amount, Percent Won, Open Date, Expected Close Date, and Requested By. A red circle highlights the 'New' button in the top left of the Quotations section.

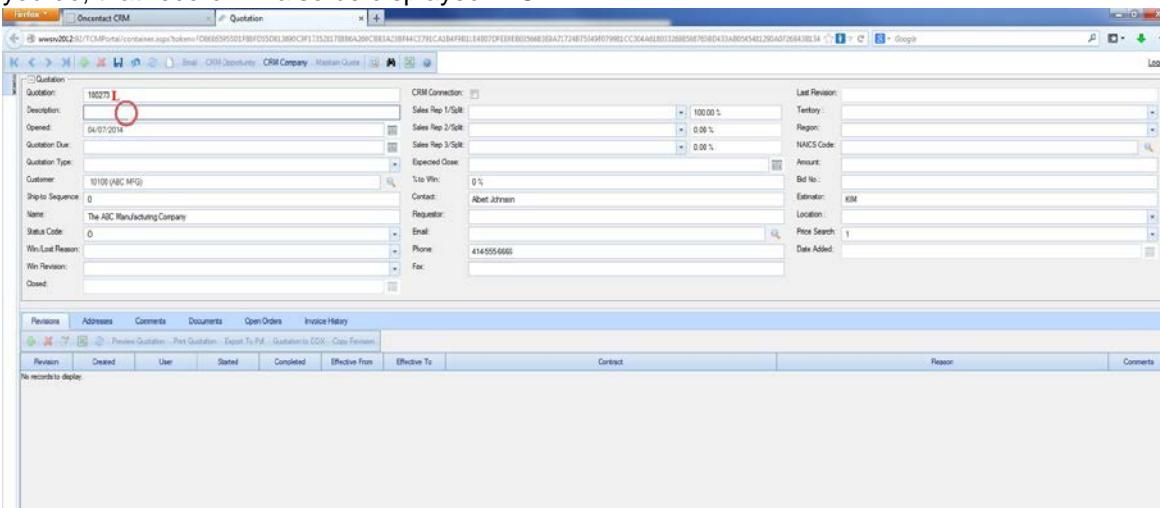
Quotation #	Description	Status	Type	Amount	Percent Won	Open Date	Expected Close Date	Requested By
100254	123	Open		0	0	3/4/2014		
2	34004 test	Open		0	0	3/12/2013		
100142	ABC MFG Q1 2014 Order	Open	Bid		0	12/18/2013	12/31/2013	HJM
100129	ABC Year End Order	Open	Bid	\$10,000.00	85	14/13/2013	10/31/2013	AI
3	Dale's Test	Open		0	0	3/27/2013		
100256	fff	Open		0	0	3/4/2014		
100143	Hedbre 10 Weeks Suply	Open	Bid	0	0	12/16/2013		
100257	hh	Open		0	0	3/4/2014		
100130	HM 2	Open		0	0	14/13/2013		
100145	HM Big Order	Open	Bid	0	0	12/24/2013		
100258	Industrial Truck	Open		0	0	3/10/2014		
100223	Roger Special Quote	Open	Federal Contract	\$10,000.00	75	9/27/2013	10/31/2013	Roger Miller
100149	Roger test rev	Open	Federal Contract	0	0	12/27/2013		
100138	Roger's Deer	Open		0	0	12/13/2013		
55	Roger's Quote in TST	Open	Bid	0	0	12/4/2013		

10. You can also add a new Quotation from CRM. Click New.

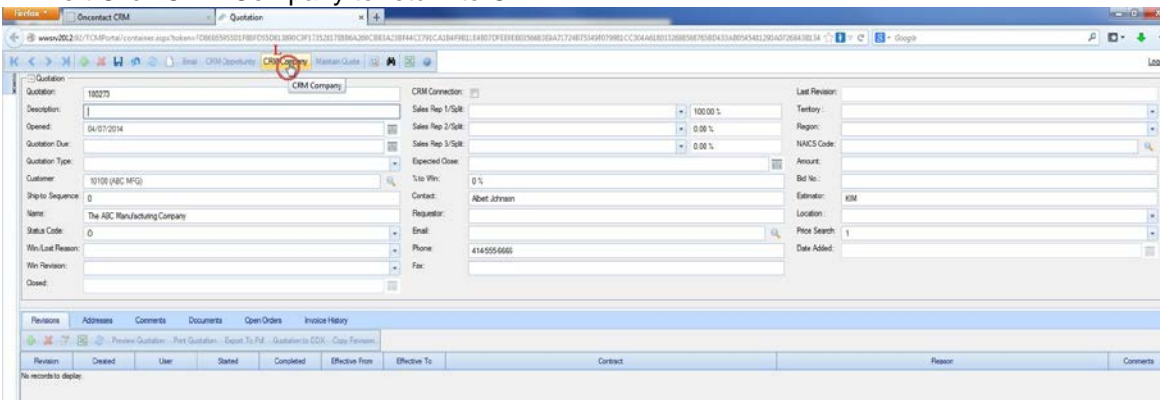
The screenshot shows the 'The ABC Manufacturing Company' record. The 'Quotations' tab is selected, displaying the same table as in the previous screenshot. A red arrow points to the 'New' button in the top left of the Quotations section.

## RB-ERP Tabs on Customer Record

11. The RB-ERP Quotation screen is displayed. You can enter and save your new Quote. When you do, that record will also be displayed in CRM.



12. Left Click CRM Company to return to CRM.





## RB-ERP Tabs on Customer Record

13. If you are using the optional RMA application, RMA data is displayed here for the Company.

**The ABC Manufacturing Company**

Name: The ABC Manufacturing Company | Address: 4885 N. 103rd St...  
 Type: | Address: 869 10 West Milwaukee, WI 53225  
 Status: | Phone: SOLDFOFA  
 Profile: | Territories: |  
 Reqs: | External ID: 10100

Status	Type	Amount	Percent Win	Open Date	Expected Close Date	Requested By
Open		0		3/4/2014		
Open		0		3/12/2013		
Open	Bid	0		12/18/2013	12/31/2013	HJM
Open	Bid	\$10,000.00	65	10/17/2013	10/31/2013	AI
Open		0		3/27/2013		
Open		0		3/6/2014		
Open	Bid	0		12/19/2013		
Open		0		3/6/2014		
Open		0		10/17/2013		
Open	Bid	0		12/24/2013		
Open		0		3/10/2014		
Open	Federal Contract	\$10,000.00	75	9/27/2013	10/31/2013	Roger Miller
Open	Federal Contract	0		12/27/2013		
Open		0		12/17/2013		
Open	Bid	0		12/4/2013		
Open		0		2/20/2014		
Open		0		3/3/2014		
Open	Bid	0		10/28/2013		

14. Left Click to open any RMA record.

**The ABC Manufacturing Company**

Name: The ABC Manufacturing Company | Address: 4885 N. 103rd St...  
 Type: | Address: 869 10 West Milwaukee, WI 53225  
 Status: | Phone: SOLDFOFA  
 Profile: | Territories: |  
 Reqs: | External ID: 10100

RMA Number	RMA Date	Claim Type	Status	Ship to Customer	Customer Name	Return To	Location	Return to Vendor	Planned Receipt	Close Date
800000	2/24/2014	Return & Replace	Open		The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			
800009	5/24/2013	Return & Credit Only	Closed		The ABC Manufacturing Company	WorkWise Company	WorkWise			5/24/2013
800009	4/16/2013	Return & Credit Only	Closed		The ABC Manufacturing Company	WorkWise Company	WorkWise			5/16/2013
800006	3/23/2013	Return & Replace	Closed		The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
800004	3/19/2013	Return & Credit Only	Closed		The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
1	11/5/2012	Return & Credit Only	Closed		The ABC Manufacturing Company	WorkWise Company	WorkWise			6/5/2013
80002	12/11/2010	Return & Replace	Closed		The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
80001	9/8/2010	Return & Credit Only	Closed		The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			3/18/2013

## RB-ERP Tabs on Customer Record

15. If you are tracking Warranty data in RB-ERP, it is displayed on the Warranty tab.

The screenshot shows the 'The ABC Manufacturing Company' record in RB-ERP. The 'RMA's' tab is active, displaying a table of Return Merchandise Authorizations. The table has columns for Date, Status, Ship-To Customer, Customer Name, Return To, Location, Return To Vendor, Planned Receipt, and Closed Date. A red circle highlights the 'Warranties' tab in the left-hand navigation menu.

Date	Status	Ship-To Customer	Customer Name	Return To	Location	Return To Vendor	Planned Receipt	Closed Date
	Replace	Open	The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			
	Credit Only	Closed	The ABC Manufacturing Company	WorkWise Company	WorkWise			5/24/2013
	Credit Only	Closed	The ABC Manufacturing Company	WorkWise Company	WorkWise			5/18/2013
	Replace	Closed	The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
	Credit Only	Closed	The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
	Credit Only	Closed	The ABC Manufacturing Company	WorkWise Company	WorkWise			8/5/2013
	Replace	Closed	The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			6/24/2013
	Credit Only	Closed	The ABC Manufacturing Company	Smithfield, RI	H & R Mfg			3/18/2013

16. All the Invoices linked to the Warranty are displayed. Left Click to open the Invoice record.

The screenshot shows the 'The ABC Manufacturing Company' record in RB-ERP. The 'Warranties' tab is active, displaying a table of warranties. A red circle highlights the 'Warranties' tab in the left-hand navigation menu. The table has columns for Invoice #, Parent Item, Parent Item Description, Serial Number, Service Customer, Customer #, Customer Order, Invoice Date, Shipment Date, Warranty Start Date, Warranty End Date, and Warranty Type.

Invoice #	Parent Item	Parent Item Description	Serial Number	Service Customer	Customer #	Customer Order	Invoice Date	Shipment Date	Warranty Start Date	Warranty End Date	Warranty Type
2010010	THW-LS	THW - LOT, SERIAL	2	ABC MFG   10100-0080	10100	54	1/13/2014	1/13/2014	1/13/2014	3/14/2014	60 Day Warranty



## RB-ERP Tabs on Customer Record

17. You can view the Invoice data.

**Order**

Sold To: The ABC Manufacturing Company

Order Date: 11/9/2013

Amount: \$1.50

Order Number: 54

PO Number:

Ship Via: Best Way

Status: A

Type: S

Terms: Net 30 days

Deposit: \$0.00

Ordered By:

Sales Rep 1: HH

Ship To: The ABC Manufacturing Company  
 4883 N. 103rd St  
 Bldg 10 West  
 Milwaukee, WI 53225  
 USA

Ship # 0 Ship Date: 1/13/2014

Invoice # 20130096 Invoice Date: 1/13/2014

Sales Rep 2: Sales Rep 3:

**Invoice History Details**

Prod Cat	Shhd Qty	Description	Total Inv	Ext Cat	Ext Prc
50	1	THR - LOT, SERIAL	\$1.50	\$1.50	\$1.50

18. You can also view the Company A/R Aging information.

**The ABC Manufacturing Company**

Name: The ABC Manufacturing Company

Type:

Status:

Profile:

Reprs: Click to add Company Representative

External Id: 10100

Addresses: 4883 N. 103rd St...  
 Bldg 10 West  
 Milwaukee, WI 53225

Phones: SOLDTOFA

Territories: Click to add Company Territory

**Warranties**

Description	Serial Number	Service Customer	Customer #	Customer Order	Invoice Date	Shipment Date	Warranty Start Date	Warranty End Date	Warranty Type
SERIAL	2	ABC MFG (10100-0000)	10100	54	1/13/2014	1/13/2014	1/13/2014	3/14/2014	60 Day Warranty

## RB-ERP Tabs on Customer Record

19. The A/R data is listed. You can open any record to view its details.

**Quick Search**

Filter by:

Search for:

the abc

The ABC Manufacturing Compan

The ABC Manufacturing Compan

The ABC Manufacturing Compan

**The ABC Manufacturing Company**

Name: The ABC Manufacturing Company

Type:

Status:

Profile:

Repe:  [Click to add Company Representative](#)

External ID: 10100

Addresses: 4085 N. 103rd St...  
Bldg 10 West  
Milwaukee, WI 53225

Phones: SOLDFORA

Territories: [Click to add Company Territory](#)

**Contacts** [New](#) [Link](#)

Click here to add Contact

[Save](#) [Delete](#) [Add To Favorites](#) [Options](#)

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**A/R Aging**

[AR Summary Aging](#)

Aged By:		Invoice Date		Up to 30		31 to 60		61 to 90		91 to 120		Over 120		Total AR		COP Ords					
Future	\$0.00	DSO	\$30.800000	DSO	\$30.800000	Credit Limit	\$5,000,000.00	Rem Credit	\$3,650,021.51												
Doc #	Orcl	Typ	Exec Dte	Disc Dte	Term	Note	Amount	Due	Future	Up to 30	31 to 60	61 to 90	91 to 120	121 +	Disc Allowed	Allowance	Ref	Ref C#	Sub ID#	AR Acct	
69	130489	Invoice	3/7/2007	4/6/2007	Net 30	Days No	\$95,000.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95,000.00	\$0.00	\$0.00				001110-0055-0100-1
73	130591	Invoice	5/16/2007	6/15/2007	Net 30	Days No	\$5.50	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7.00	\$0.00	\$0.00				001020-0055-0100-1
74	130593	Invoice	5/16/2007	6/15/2007	Net 30	Days No	\$4.50	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.50	\$0.00	\$0.00				001110-0055-0100-1
90	130622	Invoice	2/9/2008	3/9/2008	Net 30	Days No	\$423.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$428.00	\$0.00	\$0.00				001110-0055-0100-1
95	130658	Invoice	4/9/2008	5/9/2008	Net 30	Days No	\$4,500.50	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,530.00	\$0.00	\$0.00				001110-0055-0100-1
96	130670	Invoice	4/11/2008	5/11/2008	Net 30	Days No	\$108.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$118.00	\$0.00	\$0.00				001110-0055-0100-1
97	130671	Invoice	4/11/2008	5/11/2008	Net 30	Days No	\$133.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.00	\$0.00	\$0.00	QQQ			001110-0055-0100-1
125	0	Invoice	6/2/1992	6/2/1992	Cash	No	\$32.50	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$44.13	\$0.00	\$0.00				001020-0055-0100-1
126	130724	Invoice	8/9/2008	9/8/2008	Net 30	Days No	\$102.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00	\$0.00	\$0.00				001110-0055-0100-1
127	130736	Invoice	8/9/2008	9/8/2008	Net 30	Days No	\$40.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00				001110-0055-0100-1
0		Finance Charges	11/24/2013	11/24/2013	No		\$1,429.10	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,829.10	\$0.00	\$0.00				001190-0055-0100-1
50755		Invoice	2/12/2009	3/14/2009	Net 30	Days No	\$100.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	2342			001110-0055-0100-1