## **New Sales Order Reports Menu**

To standardize common practices throughout the entire Software for Hardware solution we have redesigned the *Reports* menu in Sales Orders, Sales Proposals, Change Orders and RGAs to resemble and function the same as the *Reports* menu inside a Contract Job or Quote.

## How it works:

1. Launch Software for Hardware and open a Sales Order.

Software for Hardware 15.0 Main Sales Order #: 26	615 ×						- 0	
Hotkeys Copy Sales Order Sales Order#:	Calculator Defaults I 26615 Cu	Door Elev Frame Elev POs Istomer Name Ace Cons	struction Company	Sales Date:	11/03/202	2		
Doors	Frames	Hardware	Order Info	Accessory Only	Ship To		Preht	
Sold To:		Salesperson			~	Our	Total Cost	
Customer Name		Ordered By				\$770.76		
Ace Construction Company		Customer PO	Customer PO				Selling Price without	
Address Line1		Job Name	Job Name			Discount		
111 Peachtree Street		Our Job#				\$1,271.75		
Suite B				Project Manage	er Name	Addition	al Discount%	
City Atlanta	State GA	Date Required (MM/DD/YYYY)	_	Print Options	<u> </u>			
						Total	Colling Drico	

2. **Note**: the *Preview* menu selection has been removed. Everything now falls under the *Reports* menu. Click *Reports*.

Software for Hardware 15.0										
Main Sales Order (26615) - Report Selection ×										
Report Selections	Print Elevations									
Sales Order	with Cutsheets									
Cutsheets Only										
Print Elevation Drawings Only	Print Cutsheets wi	th Page Numbers								
Material List	Pre <u>v</u> iew 💽 Email 🖂									
Packing List										
Shop List										
Print Sales Order/Shop List/Packing List	<u>C</u> lose									

- 3. Just as in Contract Jobs, the reports associated with Sales Orders are listed within the *Report Selections* list box.
- 4. When a specific report is selected the appropriate options for that report appear to the right. In this example Sales Order is selected so following options appear:

- a. *Print* to a printer button.
- b. Preview button.
- c. Email button.
- d. *Elevations* checkbox.
- e. with Cutsheets checkbox.
- f. Print Cutsheets with Page Numbers checkbox.
- 5. Select your desired option(s) then click the appropriate button to generate your report.