

# The Sales Screen: Basic Features

## Adding A customer on the fly

When entering a new [quotation](#), [work order](#) or [invoice](#) you do not need to select the customer from the drop down list.

- Instead you can simply enter your customer's information, and FastManager will create the customer on the fly for you in the background when you save the quote.
- FastManager will use as much of the information that it can obtain from the sales screen to create the customer. Such as:
  - Shipping & Billing Address
  - Contact name, telephone and email



FastManager will use default values selected in the [preferences](#) screen if it cannot obtain the information from the sales screen.

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## The Convert Button

The Convert button will display a menu with options for changing the status of the document.

- The menu is dynamic and therefore based on the current status of the document.
- You will have the following option if the current status is *Quotation*:

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

Customer: Cash Customer  
 Contact Person: Mike  
 Tel: 321-654-9870  
 Cell: . .  
 E-Mail Address: email@company.tld  
 Fax: . .  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: Darci

Work In Progress  
 Invoice  
 Lost Quotation

General Work Order Thumbnail

Date: 2019/06/04  
 Follow Up: 2019/06/04  
 Ship Method: Pick Up  
 Filter 1: Select  
 Customer PO:   
 Deposit Required: 50% - R466.53

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	FX	Hide	CG
1 G2000	GILDAN ULTRA COTTON		Black	S	10	3.68	36.80	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 G2000	GILDAN ULTRA COTTON		Black	M	10	3.68	36.80	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 G2000	GILDAN ULTRA COTTON		Black	2X	10	6.42	64.20	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 G2000	GILDAN ULTRA COTTON		White	S	10	2.93	29.30	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 G2000	GILDAN ULTRA COTTON		White	M	10	2.93	29.30	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 G2000	GILDAN ULTRA COTTON		White	2X	10	5.65	56.50	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Add Detail	Custom Embroidery	Chest - Left		2000	60	5.10	306.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Digitizing Preparation fee				1	36.00	36.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Add Detail	Custom Printing	Full Back			60	3.63	217.80	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Set-Up 1- Color Print 12-36				1	8.00	8.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	screen(s) charge				3	20.00	60.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
>					1	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)

Sub Total: 881  
 Disc: 0.00

You can convert a *Pending Quote* to a *Work Order* or go straight to *Invoice*.

- You can also mark the quotation as *Lost*.

Many times in real life, lost quotations becomes orders.

- You can convert a *Lost Quotation* back to a *Pending Quotation* or go directly to *Invoice* or *Work Order*.

Once you have created a work order you cannot go back to a quotation.



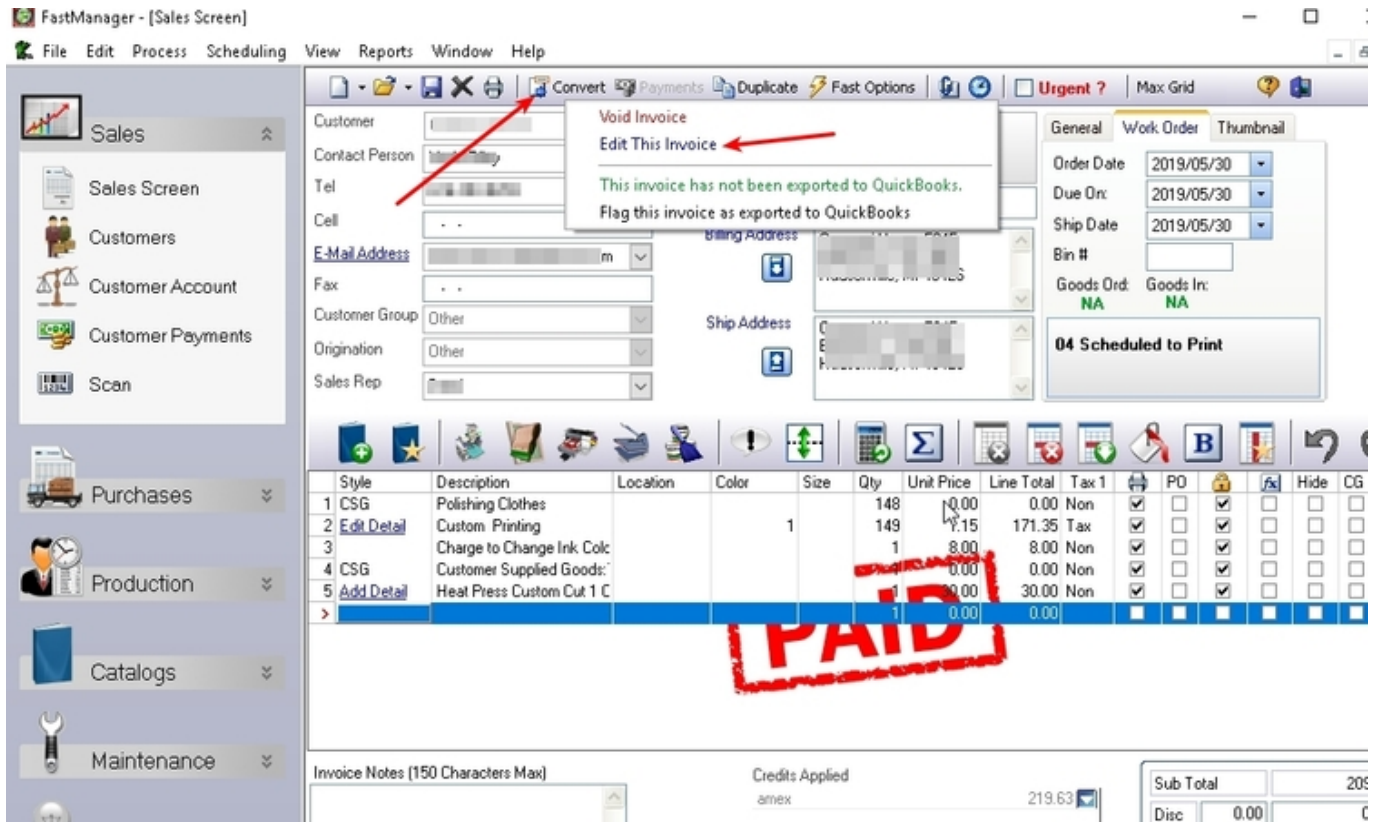
- The only 2 options are to cancel the work order or invoice it.
- The reason for this is integrity. There are many other associated records that need to be considered which is not possible when it is a quotation.
- You can, however, generate a new quotation from the contents of a Cancelled Work Order using the *Duplicate* button.

A *Canceled Work Order* can be converted back to an *In-Progress Work Order*

- however, you will need to re-schedule the entire order.

Once you have created and invoice you can only change the status to a voided invoice.

- You can also select to 'Edit' the invoice, which will temporarily unlock the invoice so that you can make changes to it.
- You can also toggle the 'sent to QuickBooks' status of the invoice.



**Once you have *Voided* an Invoice you cannot go back.**

Voiding an invoice will not only remove the transaction from the customer's register, which will subsequently reduce your customer's balance, it will also disable the Convert button.

- Once you have voided an invoice you cannot go back. If you need to re-create the invoice, use the Duplicate button.



You need to un-apply all attached payments in order to void the invoice.

## Remark Lines

Similar to the old quote pad system you can easily add remark lines.

- Simply click on the Remark Line button and select one of your pre-defined remark lines or you can choose to insert a blank remark line.

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Sales

Sales Screen

Customers

Customer Account

Customer Payments

Scan

Purchases

Production

Catalogs

Maintenance

Customer: Cash Customer

Contact Person: Mike

Tel: 321-654-9870

Cell: -

E-Mail Address: email@company.tld

Fax: -

Customer Group: General Customer

Origination: Walk In

Sales Rep: Darci

Work Order - WIP

Work Order Number: ES30972

Description (eg: tees)

Billing Address

Ship Address: Cash Customer  
Att: Mike

General Work Order Thumbnail

Order Date: 2019/06/04

Due On: 2019/06/18

Ship Date: 2019/06/18

Bin #

Goods Ord: No

Goods In: No

04 Scheduled to Print

Style	Description	Location	Color
1 G2000	GILDAN ULTRA COTTON		Black
2 G2000	GILDAN ULTRA COTTON		Black
3 G2000	GILDAN ULTRA COTTON		Black
4 Add Detail	Custom Embroidery	Chest - Left	
5	Digitizing Preparation fee		
6 Add Detail	Custom Printing	Full Back	
7	Set-Up 1- Color Print 12-36		
8	screen(s) charge		

Invoice Notes (150 Characters Max)

Add Blank Remark Line ...

Delivery 2-3 Weeks Print On

Delivery 7-10 Days Print On

If you bring your own, pl Print On

Late Payment Fees: 30 day Print On

No Proof Required Print On

Please check prices before Print On

Price is good for 15 days Print On

Price is good for 30 days Print On

Production Note: Print Off

Proof required !! Print On

The sooner we receive you Print On

We are not responsible fo Print On

Sub Total: 595

Disc: 0.00

Many smaller companies will only use the remark line system instead of capturing all the design detail.

- This saves them time and also keeps the program very simple and easy to use.



For more information about adding and customizing canned remark lines, [click here](#)



If you want to insert the remark line in a specified row, Select the row **above** where you want to insert the remark line, then hold down you SHIFT key while clicking on the remark line button.

## Separator Lines

The separator line will divide a work order in to sub sections.

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Customer: Cash Customer  
 Contact Person: Mike  
 Tel: 321-654-9870  
 Cell: - -  
 E-Mail Address: email@company.tld  
 Fax: - -  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: Darci

**Work Order - WIP**  
 Work Order Number: ES30972  
 Description (eg: tees)  
 Billing Address  
 Ship Address: Cash Customer Att: Mike

General Work Order Thumbnail  
 Order Date: 2019/06/04  
 Due On: 2019/06/18  
 Ship Date: 2019/06/18  
 Bin #  
 Goods Ord: No Goods In: No  
**04 Scheduled to Print**

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	Hide	CG
1 G2000	GILDAN ULTRA COTTON		Black	S	10	3.96	39.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 G2000	GILDAN ULTRA COTTON		Black	M	10	3.96	39.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 G2000	GILDAN ULTRA COTTON		Black	5X	10	9.31	93.10	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4 Add Detail	Custom Embroidery	Chest - Left		2000	30	5.55	166.50	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Digitizing Preparation fee				1	36.00	36.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6 Add Detail	Custom Printing	Fullback		3	30	5.08	152.40	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Set-Up 1- Color Print 12-35				1	8.00	8.00	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	screen(s) charge				3	20.00	60.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	<b>Separator Line</b>				1	0.00	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10 8000	Gildan DryBlend T-Shirt		Ash	2X	5	8.32	41.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Invoice Notes (150 Characters Max)  
 Credits Applied  
 Cash 300.00

Sub Total 636  
 Disc 0.00

This action has multiple implications:

- If you select to synchronize your embellishment quantity with that of the number of items, then FastManager will only count the number of items in the same separator group.
  - For example. If you have an order for 50 Tees and 50 Caps you would want the 'Screen Printing' to only count 50 items as you are not printing on the caps, and likewise you would like the 'Embroidery' to only count to 50 as you will only be embroidering onto 50 caps.
- If you select to amortize the embellishment charges into the garment, then FastManager will only amortize the charges into the items that belongs to the same separator group.
- FastManager will also break down the 'Design Detail' report based on the separator group, so that each set of garments are shown with its embellishment.
  - This way you cannot accidentally print the wrong art on the wrong garments.
- The separator line basically divides a work order into sub orders.

To add a separator line, click on the Add Separator Line button in the sales screen. FastManager will automatically add the line to the bottom of you sales screen. You can then drag it to another position.



You can also add a separator line below the currently selected row by holding down you SHIFT key while you click on the button.

## Amortization

One of the major benefits in FastManager compared to any other product, including generic account software, is that you can choose if you want to *amortize* your services prices into the garment price.

- FastManager is smart enough to remember what the embellishment costs are, so FastManager will still show the correct breakdown of sales when printing a sales analysis report, even though the prices are consolidated into your garments.

Once amortized you can still override the selling price, and FastManager will then adjust the garment price to accommodate a rounded total.



FastManager will prevent you from discounting the total price if this will result in the garment price being reduced to **less than zero**.

FastManager will only amortize into items that are flagged as `Included in item count` within that separator group.

- An item flagged as `Included in item count` cannot be amortized into other items.

To amortize a line item into other items, check the `Amortization` box in that row.

- FastManager will automatically change the unit price to zero as well as divide the total price by the number of items in that separator group, and add it to each item.

[amortize.mp4](#)

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## Locking Prices

As we said before FastManager is basically a sophisticated lookup system, saving you all the time and hassle of calculating or looking up costs and prices.

- If you don't want FastManager to calculate or lookup a price on a specific line item then you can lock the line item.
- You will see a padlock icon above that column. See below.



FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Customer: Cash Customer  
 Contact Person: Mike  
 Tel: 321-654-9870  
 Cell: - -  
 E-Mail Address: email@company.tld  
 Fax: - -  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: Darci

Work Order - WIP  
 Work Order Number: ES30972  
 Description (eg: tees)  
 Billing Address  
 Ship Address: Cash Customer Att: Mike

General Work Order Thumbnail  
 Order Date: 2019/06/04  
 Due On: 2019/06/18  
 Ship Date: 2019/06/18  
 Bin #  
 Goods Ord: No  
 Goods In: No  
 04 Scheduled to Print

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	Print	Hide	CG
1 G2000	GILDAN ULTRA COTTON		Black	S	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 G2000	GILDAN ULTRA COTTON		Black	M	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 G2000	GILDAN ULTRA COTTON		Black	5X	10	23.41	234.10	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Add Detail	Custom Embroidery	Chest - Left		2000	30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Digitizing Preparation fee				1	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Add Detail	Custom Printing	Full Back		3	30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Set-Up 1- Color Print 12-35				1	0.00	0.00	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	screen(s) charge				3	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Separator Line				1	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 8000	Gildan DryBlend T-Shirt		Ash	2X	5	8.32	41.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
>					1	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)  
 Credits Applied  
 Cash 300.00  
 Sub Total 636  
 Disc 0.00

- As soon as you unlock the row then FastManager will update the line price of that item from the database again.



FastManager will automatically lock a price if you override it by typing in your own price.

- in other words, it assumes that *you want to dictate the price* instead of getting it from the database.

## Printing Customer Rows on Documents

You can select if you want line items to print on customer documents or not.

- For example, if you add a remark line that is intended for one of your production staff but do not want your customer to see that on his/her quotations, sales order confirmation or invoices - then you need to uncheck the print box for the line item

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

**Sales**

Sales Screen Customers Customer Account Customer Payments Scan

Purchases Production Catalogs Maintenance

Customer: Cash Customer  
 Contact Person: Mike  
 Tel: 321-654-9870  
 Cell: - -  
 E-Mail Address: email@company.tld  
 Fax: - -  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: Darci

**Work Order - WIP**  
 Work Order Number: ES30972  
 Description (eg: tees)  
 Billing Address  
 Ship Address: Cash Customer Att: Mike

General Work Order Thumbnail

Order Date: 2019/06/04  
 Due On: 2019/06/18  
 Ship Date: 2019/06/18  
 Bin #  
 Goods Ord: No  
 Goods In: No

**04 Scheduled to Print**

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	Print	Hide	CG
1 G2000	GILDAN ULTRA COTTON		Black	S	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 G2000	GILDAN ULTRA COTTON		Black	M	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 G2000	GILDAN ULTRA COTTON		Black	5X	10	23.41	234.10	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4 Add Detail	Custom Embroidery	Chest - Left		2000	30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Digitizing Preparation fee				1	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6 Add Detail	Custom Printing	Full Back		3	30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Set-Up 1- Color Print 12-35				1	0.00	0.00	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	screen(s) charge				3	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Separator Line				1	0.00	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10 8000	Gildan DryBlend T-Shirt		Ash	2X	5	8.32	41.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>					1	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)

Credits Applied  
 Cash 300.00

Sub Total 636  
 Disc 0.00

You can only uncheck the print option if the line total is **zero**.



- for example, you can amortize the amount from the row you don't want to print into another item that you do intend to print.
- The reason for this is: if you print an invoice that the invoice totals should match up if you add up all the line items.

## Add Items to the PO wizard

FastManager will *automatically* add any items from your order to the [PO Wizard](#), if they have that option enabled on the work order (WIP)

Imported vendor catalogs will have this option enabled by default for all items and you can set the option to enabled or not in your own custom items, in their setup on the [catalog item edit screen](#)



FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

**Sales**

Sales Screen  
Customers  
Customer Account  
Customer Payments  
Scan

Purchases  
Production  
Catalogs  
Maintenance

Customer: Cash Customer  
Contact Person: Mike  
Tel: 321-654-9870  
Cell: - -  
E-Mail Address: email@company.tld  
Fax: - -  
Customer Group: General Customer  
Origination: Walk In  
Sales Rep: Darci

**Work Order - WIP**  
Work Order Number: ES30972  
Description (eg: tees)  
Billing Address  
Ship Address: Cash Customer  
Att: Mike

General Work Order Thumbnail  
Order Date: 2019/06/04  
Due On: 2019/06/18  
Ship Date: 2019/06/18  
Bin #  
Goods Ord: No  
Goods In: No  
**04 Scheduled to Print**

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	CG	Hide
1 G2000	GILDAN ULTRA COTTON		Black	S	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 G2000	GILDAN ULTRA COTTON		Black	M	10	18.06	180.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 G2000	GILDAN ULTRA COTTON		Black	5X	10	23.41	234.10	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Add Detail	Custom Embroidery	Chest - Left			30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Digitizing Preparation fee				1	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6 Add Detail	Custom Printing	Full Back		3	30	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Set-Up 1- Color Print 12-35				1	0.00	0.00	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	screen(s) charge				3	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Separator Line				1	0.00	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10 8000	Gildan DryBlend T-Shirt		Ash	2X	5	8.32	41.60	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
>					1	0.00	0.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)

Credits Applied  
Cash 300.00

Sub Total 636  
Disc 0.00



This also applies to embellishment line items if you are planning to outsource the work.



This does not apply to Quotations. The items will only be added to the PO Wizard after the order is converted to a work order (WIP)

## Customer Goods

If a customer is supplying your their goods you can tell FastManager that the items are Customer Goods

- FastManager will then set the retail price as well as the costs to zero and you can then check in their goods from the Job Board.
- To mark items as Customer Goods ensure that the check box under the CG column (which stands for *customer goods*) is checked.

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Customer: Cash Customer  
 Contact Person: Test  
 Tel: 321-654-9870  
 Cell: - -  
 E-Mail Address: test@cash.solutions  
 Fax: - -  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: House Account

Quotation - Pending  
 New Document - Not Saved. # prefix (DS)  
 test

Billing Address:  
 Ship Address:

General Work Order Thumbnail  
 Date: 6/7/2019  
 Follow Up: 6/7/2019  
 Ship Method: Pick Up  
 Filter 1: Select  
 Customer PO:  
 Deposit Required 50% - \$731.31

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	PO	fx	Hide	CG
1 0012DU	7290 - Athletic Polo		Black-White	S	15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 0012DU	7290 - Athletic Polo		Black-White	M	15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3 0012DU	7290 - Athletic Polo		Black-White	2K	15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 0012DU	7290 - Athletic Polo		Black-White	3K	15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 0012DU	7290 - Athletic Polo		Black-White	L	15	32.25	483.75	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Custom Screen Printing- w.	Center - Front		3	75	2.65	198.75	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Artwork Preparation per ho				1	25.00	25.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Screen Usage Charge				3	20.00	60.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Promo	Cap - Left			75	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	Art				1	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)

Sub Total 137  
 Disc 0.00



You can create a [custom catalog](#) called *Customer Goods* and then create generic items such as Tees, Caps and Polos.

## Adding Items To The Item Count

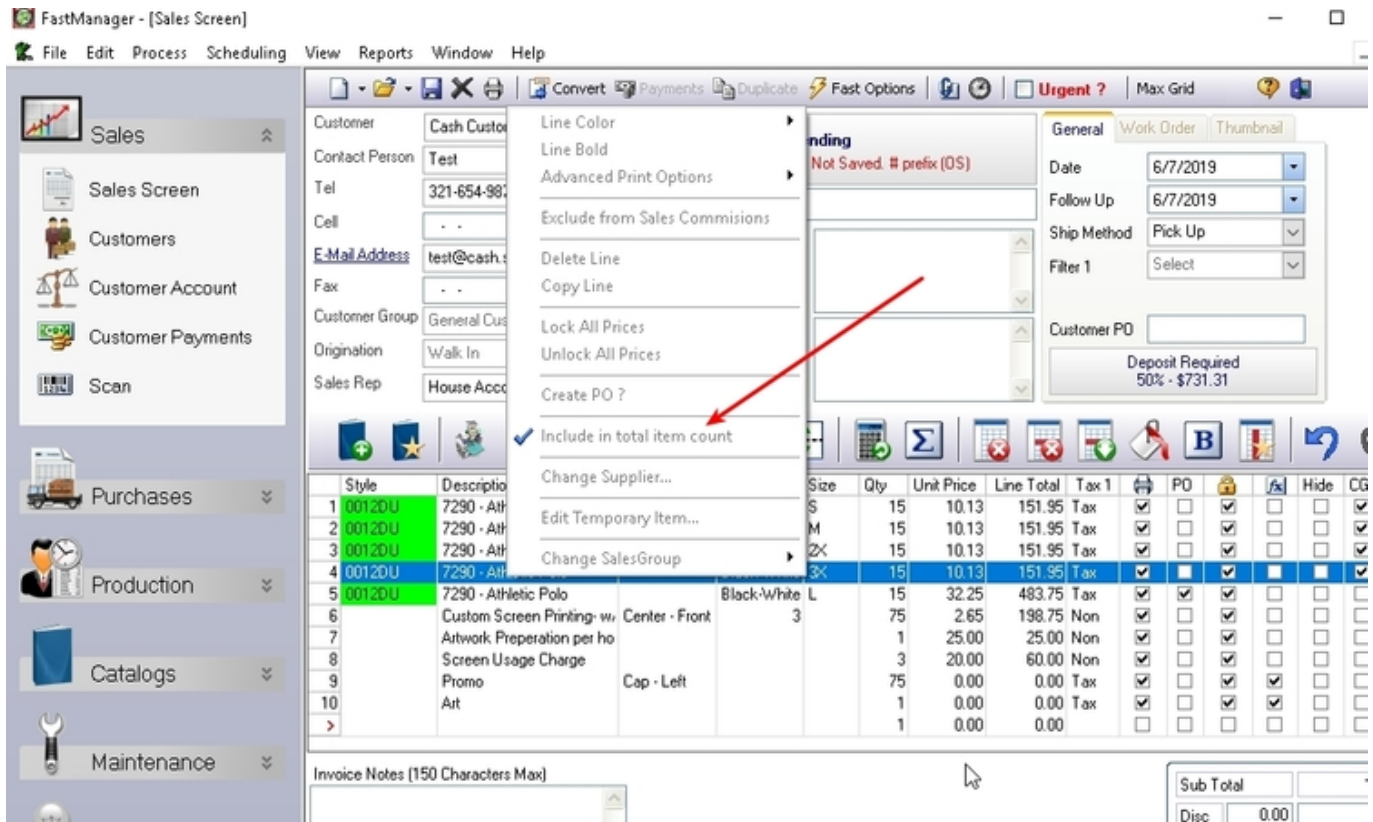
FastManager counts the number of items you have in 3 instances:

1. When trying to determine the correct markup, as it is based on the number of items that your customer orders.
2. When amortizing embellishment costs into garment costs (FastManager needs to know how many items there are per separator group).
3. When synchronizing service charges (FastManager needs to count the number of items per separator group),
  - You may not want FastManager to count a line item as part of the number of items.



For example, you would not want FastManager to amortize your embellishment costs into a line item called Shipping.

If you want to exclude an item from the total item count right-click on the line item and *uncheck*:  
 Include in total item count



## Synchronizing Service Counts

You can select to synchronize the number of embellishments with the number of items within a separator group.

- For Example: You can have FastManager automatically update the number of prints as you change the number of garments.



You can set each price list up to synchronize by default when creating the various price lists

You can toggle this setting by right-clicking on the service line and selecting Sync Qty With Item Count

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

**Sales**

- Sales Screen
- Customers
- Customer Account
- Customer Payments
- Scan

**Purchases**

**Production**

**Catalogs**

**Maintenance**

Customer: Cash Customer  
 Contact Person: Test  
 Tel: 321-654-9870  
 Cell: - -  
 E-Mail Address: test@cash.solutions  
 Fax: - -  
 Customer Group: General Customer  
 Origination: Walk In  
 Sales Rep: House Account

Line Color  
 Line Bold  
 Advanced Print Options  
 Exclude from Sales Commissions  
 Delete Line  
 Copy Line  
 Lock All Prices  
 Unlock All Prices  
 Additional Charges  
 Sync Qty With Item Count  
 Edit Design Detail  
 Print Customer Proof  
 Print Design Detail  
 Change Supplier...  
 Change SalesGroup

General Work Order Thumbnail

Date: 6/7/2019  
 Follow Up: 6/7/2019  
 Ship Method: Pick Up  
 Filter 1: Select  
 Customer PO:  
 Deposit Required: 50% - \$731.31

Qty	Unit Price	Line Total	Tax 1	PO	Hide	CG
15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	10.13	151.95	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	32.25	483.75	Tax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
75	2.65	198.75	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	25.00	25.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	20.00	60.00	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
75	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	0.00	0.00	Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	0.00	0.00	Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Style Description

1	0012DU	7290 - Athletic P
2	0012DU	7290 - Athletic P
3	0012DU	7290 - Athletic P
4	0012DU	7290 - Athletic P
5	0012DU	7290 - Athletic P
6		Custom Screen Printing
7		Artwork Preparation per ho
8		Screen Usage Charge
9		Promo
10		Art

Cap - Left

Invoice Notes (150 Characters Max)

Sub Total: 1:  
 Disc: 0.00



FastManager will also automatically turn the synchronization off when you overtype the service quantity assuming that you want to enter the quantity manually.

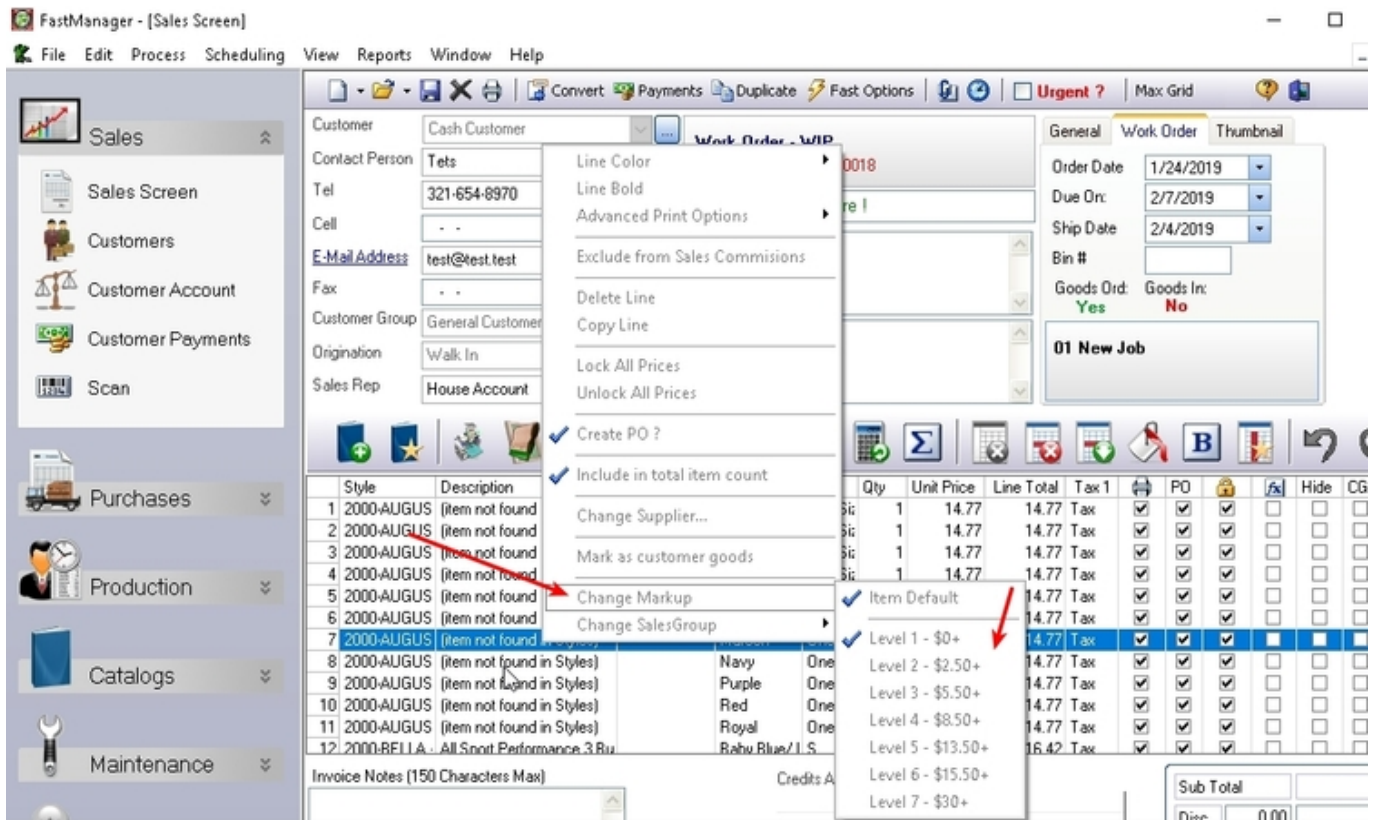
## Changing item Markup on the fly

You can change the markup assigned to a catalog item for a single line item at a time for a particular order.

This will not change the default markup assigned in the master file.

- right-click on the catalog item, Select Change Markup and select the new markup that you want to apply to that item (for this order only)





This option will not work if the line item is specified as customer goods or if the price is locked.

## Changing The Required Deposit on the Fly

FastManager will automatically set the *deposit required* percentage to that of the selected customer.

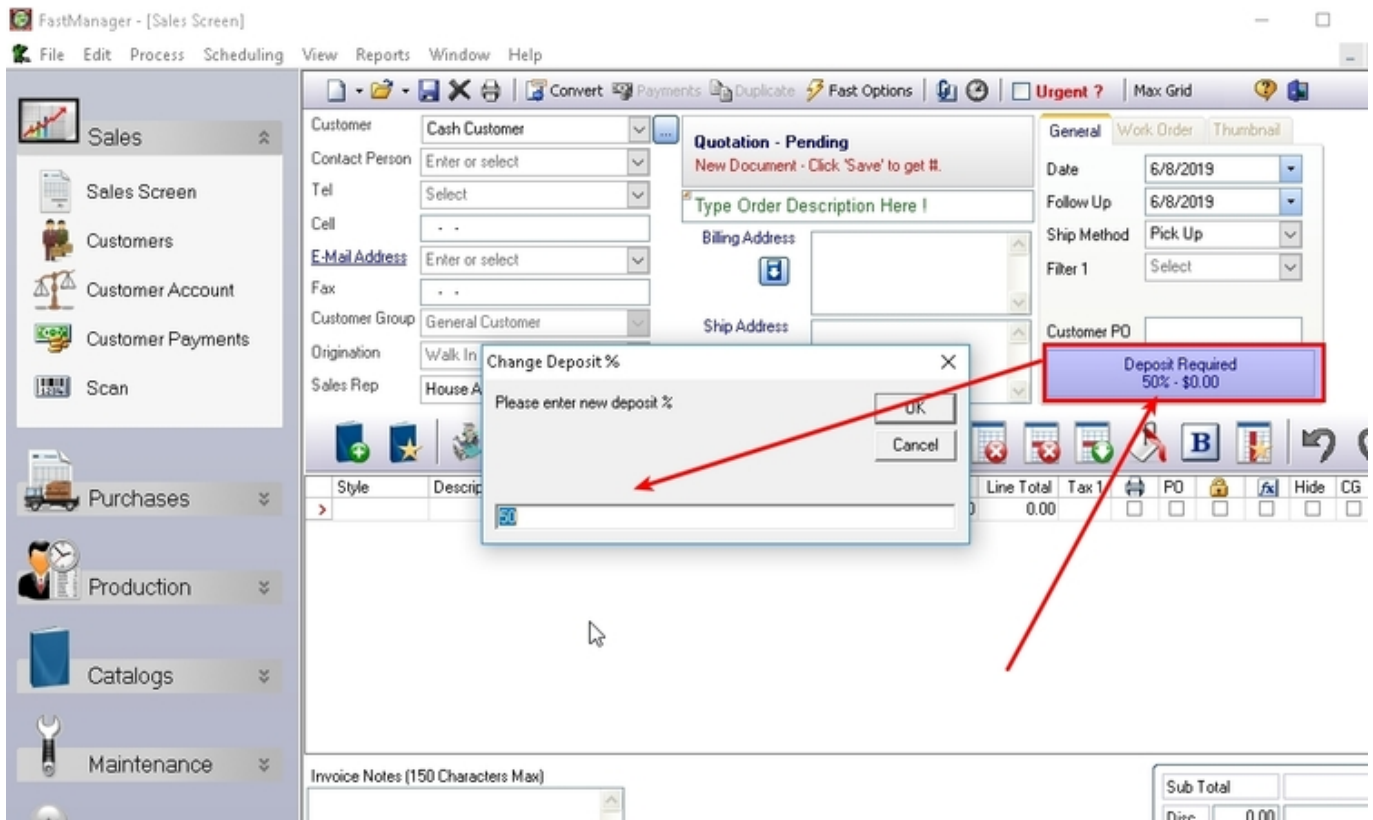
However if you are entering a new customer (Creating a customer on the fly), then FastManager will default to what you have selected in the company preferences.



When creating a customer on the fly, FastManager will set it's *deposit required* percentage to whatever you have selected in the sales screen, at the time of creating the customer.

To change deposit percentage for a particular order, simply click on the deposit percentage label and enter a new percentage





If you have a different percentage for any particular order than the customer's default. For example:



- By default ACME Company Inc will pay a 0% deposit as they are a good customer.
- However they placed a very large order with your company and to help fund the purchases you require them to pay a 30% deposit on this one order only.
- You can simply click on the Deposit label and change it for just this order.

## Changing the Tax Percentage

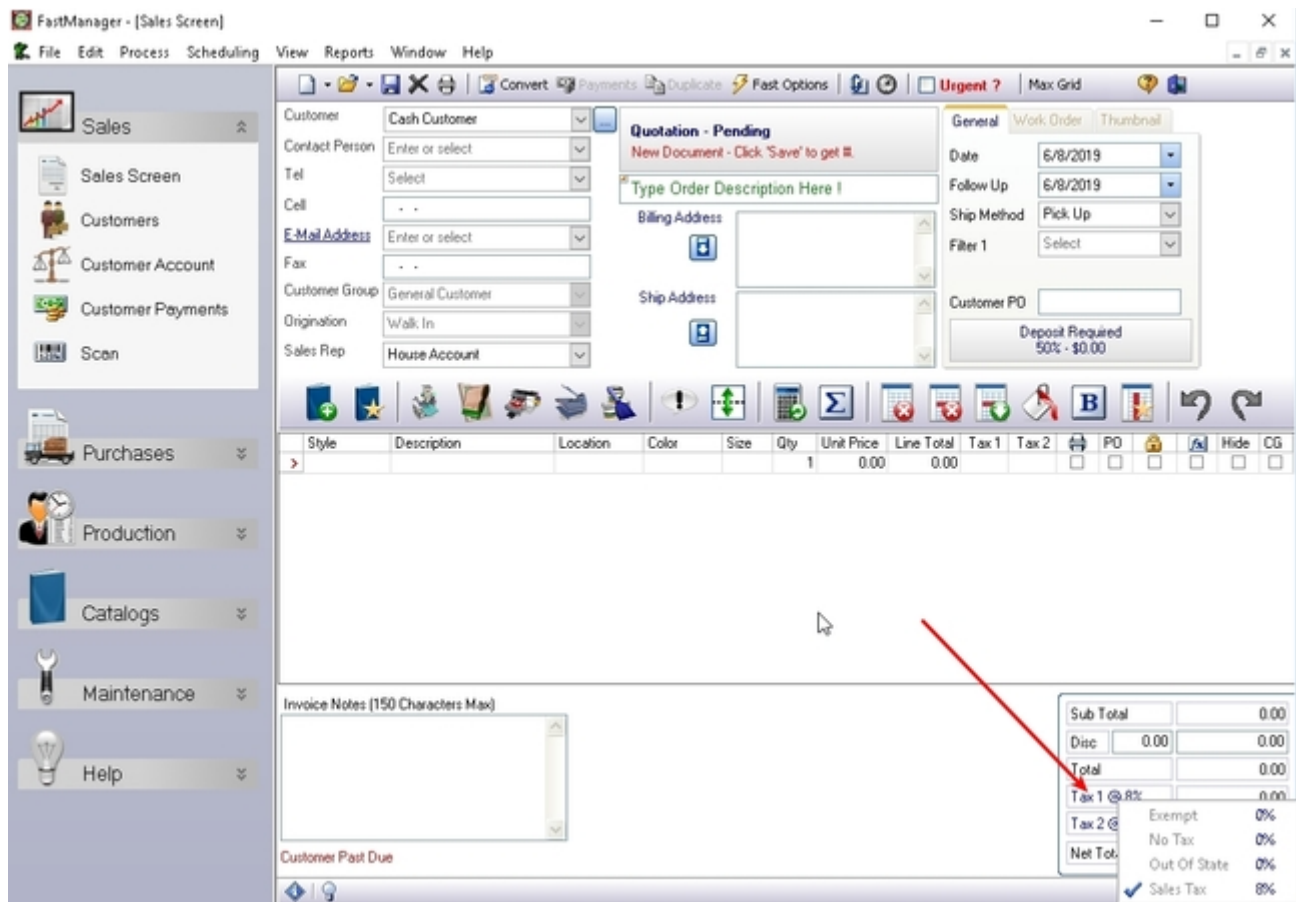
FastManager will automatically change the tax percentage (visible at the lower-right of the Sales Screen) to that of the selected customer.

- However if you are entering a new customer (Creating a customer on the fly), then FastManager will default to what you have selected in the company preferences.



When creating a customer on the fly, FastManager will set that new customer's default tax percentages to whatever you have selected in the sales screen, when you save the order.

To change tax type for a particular order, simply click on any of the tax percentages below and select a new tax type.



## The Order Prefix

FastManager will automatically add a prefix to your WO number.

- The purpose behind this is that you can identify the range of embellishments that are contained in that order by just looking at the WO number.
- FastManager will add a single instance of each of the following letters if the work order contains one or more of the associated embellishment:

Prefix	Meaning
S	Screen Printing
E	Embroidery
G	Garment Printing
H	Heat Pressing
O	Other - Generic Embellishment

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Convert Payments Duplicate Fast Options Urgent ? Max Grid

**Sales**

Sales Screen

Customers

Customer Account

Customer Payments

Scan

Purchases

Production

Catalogs

Maintenance

Customer: Cash Customer

Contact Person: Test

Tel: 321-564-9870

Cell: . .

E-Mail Address: test@cash.solutions

Fax: . .

Customer Group: General Customer

Origination: Walk In

Sales Rep: House Account

**Work Order - WIP**

Work Order Number: ES10014

Test Alpha Integration

Billing Address

Ship Address

General Work Order Thumbnail

Order Date: 11/27/2018

Due On: 12/11/2018

Ship Date: 12/6/2018

Bin #

Goods Ord: Yes

Goods In: No

01 New Job

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	Tax 2	PO	Hi
1 298	Youth 5.6 oz. DRI-POW-EE		AQUATIC B	XS	1	6.27	6.27	Tax	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 Edit Detail	Embroidered Name & # 11		10000		1	10.00	10.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Edit Detail	Custom Screen Printing: w/			1	1	4.82	4.82	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Artwork Preparation per ho				1	25.00	25.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Screen Usage Charge				1	20.00	20.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>					1	0.00	0.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Invoice Notes (150 Characters Max)

Credits Applied

Sub Total

Disc 0.00

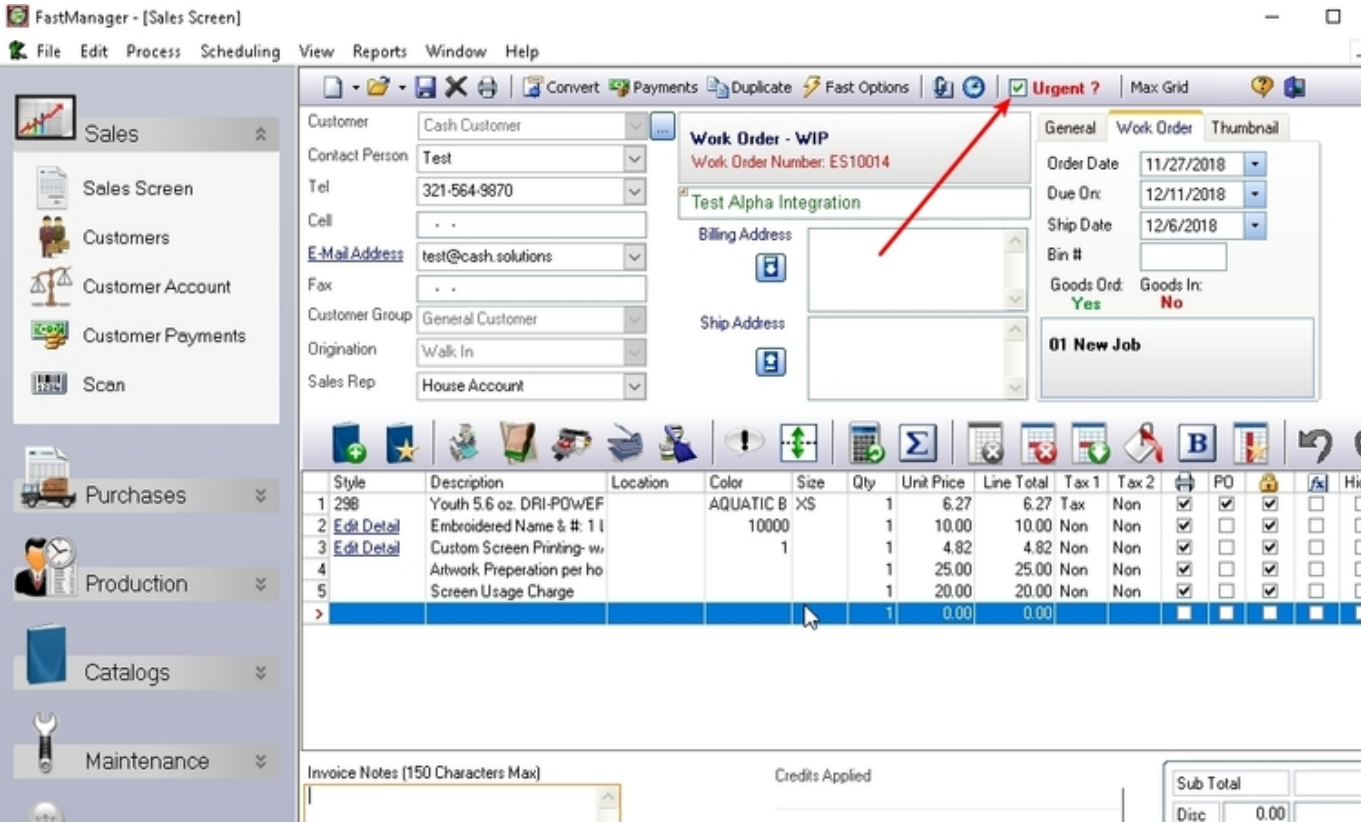
**For example:**

If you see a work order number **ES10144** then you know immediately that this order will have to go through the *Embroidery* as well as the *Screenprinting* departments without even opening the order.

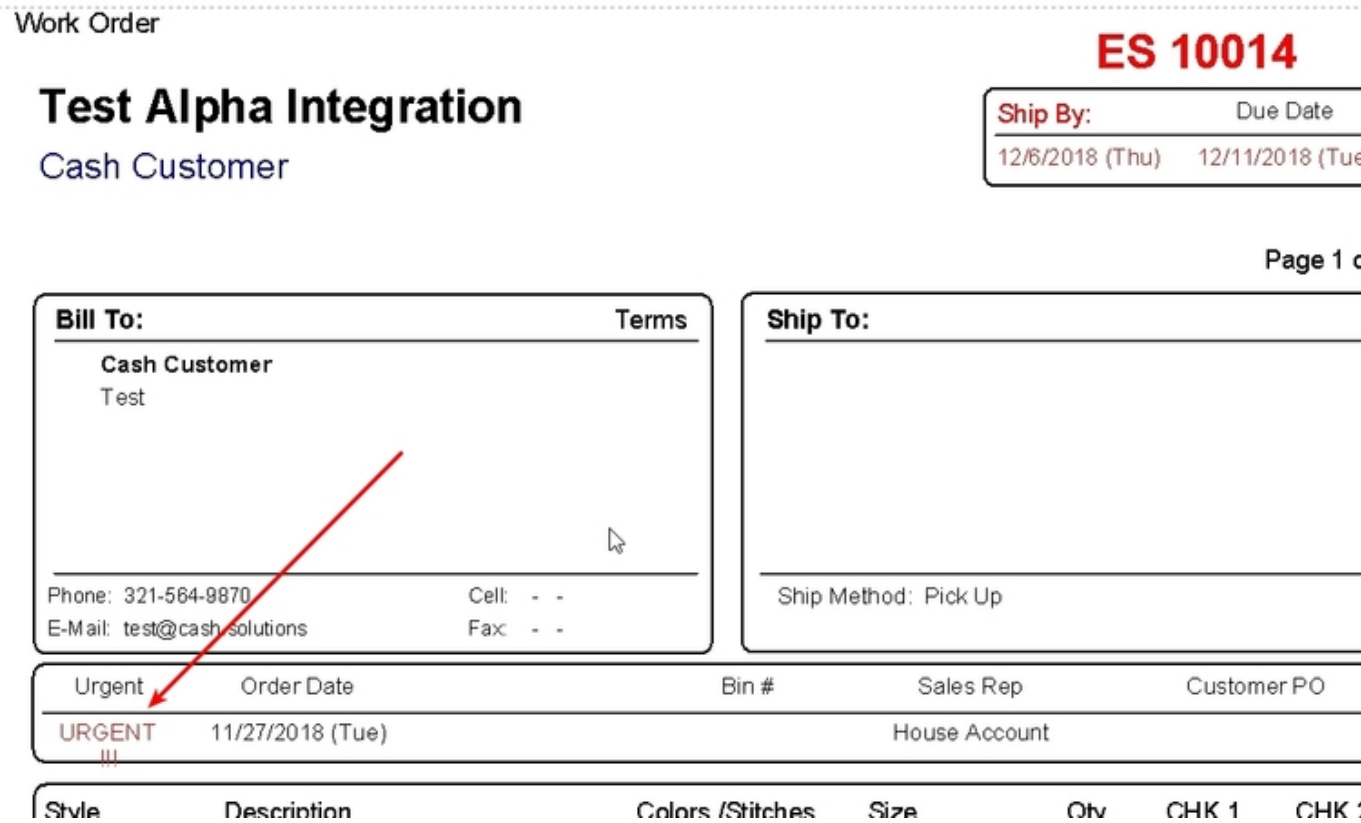
## Urgent Orders

You can select to mark an order as urgent.

- This basically means that it is an event date and that you cannot negotiate that date.
- Also the urgent status would appear on the work order print outs as well as when using the PO wizard, you will see which orders are urgent and you need to order the goods.
- Check the urgent check box at the top of the sales screen if the order is urgent.



- See the work order status on the WO print out



- See the urgent status indicated on the *Job Board*

PO Wizard

Create OrderPrintRefreshPreferencesConsolidation of items complete.Help

ConsolidateOrder By W/O #

Filter...

Ship Date <= 06/15/2019All DatesSales RepOptional Filter All GroupsCustomer All CustomersW/O Status <> All W/O StatusOnly show urgent orders!Show Design and ASI line items (In other words: Orders that I out source)

Vendor 1 of 1 - Alpha Shirt CompanyFree Ship Amt: 0.00

<<PreviousNext>>Select...View All Vendors

SelectCollapsExpandPrint

Style	Description	Color	Size	Req	Ord	ORD	Cost	L	Comment
298	Youth 5.6 oz DRI-POWER ACTIVE T-Shirt	AQUATIC BLUE	XS	1	1	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	1 order(s). WARNING! At least 1 order was scheduled to ship 184 days ago.
W/O# ES10014	Cash Customer - Test.Alpha Integration	12/6/2018	URGENT!	1	1	<input checked="" type="checkbox"/>			W/O Entry Date: 11/27/2018 (193 day(s) ago)

- See urgent status in the PO Wizard, when ordering goods.

PO Wizard

Create OrderPrintRefreshPreferencesConsolidation of items complete.Help

ConsolidateOrder By W/O #

Filter...

Ship Date <= 06/15/2019All DatesSales RepOptional Filter All GroupsCustomer All CustomersW/O Status <> All W/O StatusOnly show urgent orders!Show Design and ASI line items (In other words: Orders that I out source)

Vendor 1 of 1 - Alpha Shirt CompanyFree Ship Amt: 0.00

<<PreviousNext>>Select...View All Vendors

SelectCollapsExpandPrint

Style	Description	Color	Size	Req	Ord	ORD	Cost	L	Comment
298	Youth 5.6 oz DRI-POWER ACTIVE T-Shirt	AQUATIC BLUE	XS	1	1	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	1 order(s). WARNING! At least 1 order was scheduled to ship 184 days ago.
W/O# ES10014	Cash Customer - Test.Alpha Integration	12/6/2018	URGENT!	1	1	<input checked="" type="checkbox"/>			W/O Entry Date: 11/27/2018 (193 day(s) ago)

Sales Group



Each line item in the sales screen is linked to a sales group.

You can configure or change the associated sales group for a given Pricing item from it's maintenance screen.

- [Click Here](#) to review the setup options and requirements for Items, Embellishments, Additional Charges and Miscellaneous Charges

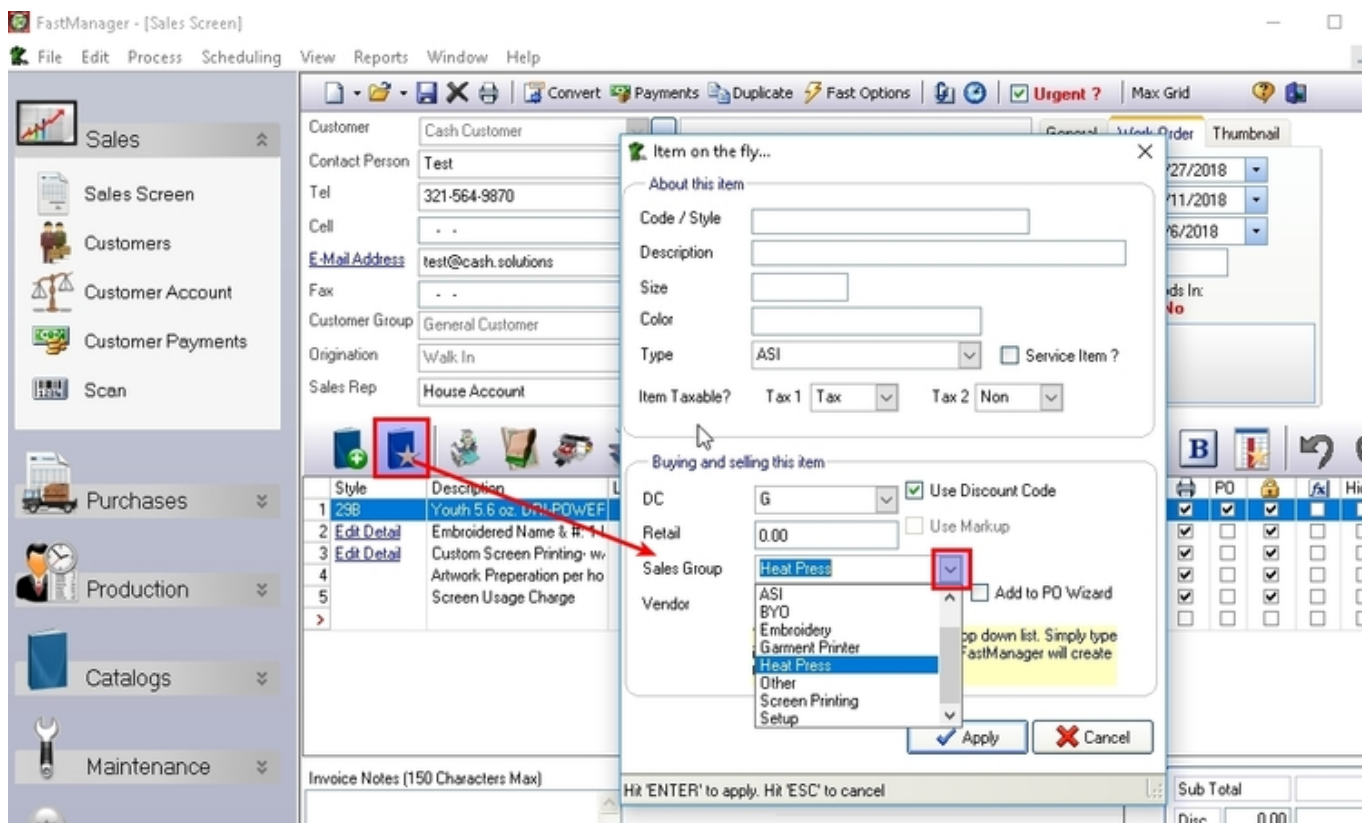
To override (change) the Sales Group *on-the-fly* on the Sales Screen, right-click on any item row and go to Change Sales Group in the context menu:

The screenshot displays the FastManager Sales Screen interface. On the left is a sidebar with navigation tabs: Customers, Customer Account, Customer Payments, Scan, Purchases, Production, Catalogs, Maintenance, and Help. The main area is divided into several sections. At the top, there are input fields for Customer information (Cell, E-Mail Address, Fax, Customer Group, Origination, Sales Rep) and Billing/Ship addresses. Below these is a toolbar with various icons. The central part of the screen shows a table of line items. A right-click context menu is open over the first line item, listing options such as 'Line Color', 'Line Bold', 'Advanced Print Options', 'Exclude from Sales Commissions', 'Delete Line', 'Copy Line', 'Lock All Prices', 'Unlock All Prices', 'Create PO?', 'Include in total item count', 'Change Supplier...', 'Mark as customer goods', 'Change Markup', and 'Change SalesGroup'. The 'Change SalesGroup' option is highlighted with a red box. To the right of the table is a summary section with fields for Ship Date, Bin #, Goods Ord, Goods In, and a '01 New Job' button. At the bottom right, there is a totals section showing Sub Total, Disc, Total, Tax 1 @ 8%, Tax 2 @ 8%, and Net Total. The status bar at the bottom indicates 'e: MS SQL SERVER' and 'Serial # ERROLL Version: 2017.71'.

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	Tax 2	PO	Hide	CG
1 298	Youth 5.6 oz. DRI-POWEE		AQUATIC B	XS	1	6.27	6.27	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Embroidered Name	Line Color			1	10.00	10.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Custom Screen Print	Line Bold			1	4.82	4.82	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Artwork Preparation	Advanced Print Options			1	25.00	25.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Screen Usage Charge				1	20.00	20.00	Non	Non	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>					1	0.00	0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sub Total	66.09
Disc	0.00
Total	66.09
Tax 1 @ 8%	0.50
Tax 2 @ 8%	0.00
Net Total	66.59

Remember to select the correct Sales Group when creating *Temporary Items*:



The sales group is important if you want a sales report that will break down your sales based on it's sales group.  
The sales group will also determine which item code is selected when exporting the line item to QuickBooks.



For more information about how to customize the list of available sales groups in FastManager, [click here](https://docs.fastmanager.com/sales/sales_screen)

[← Sales: Overview](#)

[The Sales Screen: More Features →](#)

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