Tradepoint Workflows

A Step by Step Guide for the most Commonly used workflows in Tradepoint Enterprise.

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Order Fulfillment – For Web Orders

Orders through the web will automatically have created a customer account with all order and shipping details. Alerts will be emailed to a specified email address and appear within Tradepoint once the user has logged in to Tradepoint.

1. Orders will appear within the flyout panel with the status of credit cleared.
2. Printing options for orders are available through the flyout panel. Orders can be printed out by highlighting more than one order using the control key and choosing your printing options. Packing Slips and Pick Lists can also be printed out at point.
3. Pick and pack the orders.
4. Once orders are ready to be shipped, go back into the flyout panel. Orders will be completed with shipping labels printed through Tradepoint as orders are updated in the fulfillment wizard.
5. Shipping labels and tracking numbers are generated individually as orders are run through the fulfillment wizard. Highlight an order and click the fulfill icon in the flyout panel.
6. The fulfillment wizard will verify the items in the order on the second screen of the fulfillment wizard.
7. Update the numbers on the second screen if necessary. Changing any of the item quantities to 0 will prompt a partial shipment. This means the order will stay open in the fulfillment wizard until all items have been shipped. Each shipment processed will generate a separate tracking number and post it to the order in the customer's account once the fulfillment wizard is completed. (This screen also has an option to print out a packing slip, which can be customized).
8. Click the next button to verify the shipment details. The tracking number will not appear on this screen. It will be generated once the fulfillment wizard is closed.
9. Click the next button to reach the last screen in the fulfillment wizard. Printing options will be pre-checked. Click the finish button to print out shipping labels and update the customer's account.
10. Once the shipping wizard has been finished then an email notification will be generated and sent to the email address on file, the customer's file will be updated with the shipment information, the payment will be cleared and an Invoice will be created within the customer's account.

Tradepoint – Internal Order Processing (New Customers)

There are points within the process that can be done differently depending on specifics for each business. The steps below are the most efficient for processing phone orders within Tradepoint.

1. Establish if the customer calling in is already within Tradepoint. Doing a last name search using the Quick Search field in the lower left is the easiest way to find out.
2. If they are not in Tradepoint then no search results will come up. In that case go to Customers and click the New icon in the lower left of the screen to start a new customer account.
3. Once a new customer screen has popped up click on the address icon to enter in the main address. There is a screen within orders to add an alternate shipping address within the orders screen.
4. Add any phone contact and email information on the main contact info screen. (If the customer is an individual and not a business then check off the individual box if it has not been pre-checked)
5. Click on the Order screen and click the New button in the lower right to add a new Order.
6. Within the Orders screen, click the line item row to add products.
7. The product search tool will allow one or more products to be added at once. Enter in a partial or full product name, model number or use the % sign to search by key word. (the % search option ill search across the entire product information for all products with a key word within the product listing)
8. Click the Save button within the product search to add multiple products or double click on a single line item in the product search to add it to the order.
9. Once all products are added choose a shipping method. (Found at the bottom of the screen in the default screen layout.)
10. An order can be emailed to the customer while on the phone with them using the print button in the upper left. Once in the print preview screen click on the email button to email the order as a PDF.
11. Click the Legacy Payment button to process credit card information. The card number, name as it appears on the card, expiration date and 3 digit security code are required for credit card processing. (Card numbers are not stored within Tradepoint, only the authorization number generated from the transaction will be stored)
12. Once the credit card has been authorized, the status will automatically change from submitted to credit cleared, the customer will receive an email notification generated from Tradepoint and a notification will be generated for a new shipment ready for fulfillment.

Order Options within the Order screen

1. Discounts: These can be given at the line item level or applied to multiple line items by highlighting more than one line item and clicking the Discount button in the top orders tool bar.

2. Choose a flat rate discount, a percentage or choose from an existing price list in the drop down menu. Click the Save button to apply the discount for this Order.
3. An Invoice can be generated for specific line items if highlighted. This is typically used in work flow processes that are different from processing web and phone based orders. (building construction, engineering are two examples)
4. Edit a Bill of Materials. Any products that are a Bill of Materials can be edited by highlighting the BOM product and clicking the Edit Bill of Materials button. The product details will display, make any edits for this particular order and save changes.
5. Screen customization options are under the Layout section to modify the appearance and function of the Order screen. The screen will already be customized by the time a company goes live with Tradepoint.
6. The New Shipment button will start the shipping fulfillment wizard to fulfill all or part of an order from the orders screen.
7. The Send Status Email button will automatically send an Order Confirmation Email to a customer once a credit card has been cleared. This option will likely be automatically set for order processing.

Order Fulfillment – For Drop Shipped Orders

Orders through the web will automatically have created a customer account with all order and shipping details. Alerts will be emailed to a specified email address and appear within Tradepoint once the user has logged in to Tradepoint.

1. Orders will appear within the flyout panel with the status of Drop Shipped Orders as In Production.
2. Printing options for orders are available through the flyout panel. Orders can be printed out by highlighting more than one order using the control key and choosing your printing options. Packing Slips and Pick Lists can also be printed out at point.
3. Click the fulfill button in the Flyout Panel to start the fulfillment processed for drop shipped orders.
4. The fulfillment wizard will verify the items in the order on the second screen of the fulfillment wizard.
5. In you have information regarding only part of a drop shipped order (when more than one Supplier has been used) then specify the item/s being fulfilled and update the quantity that has been shipped out by your Supplier.
6. Add any tracking numbers for the item/s being fulfilled. The items added here will update the customer's account with one or more tracking numbers.
7. Click the next button to reach the last screen in the fulfillment wizard. Printing options will be pre-checked. Click the finish button to print out shipping labels and update the customer's account.
8. Once the shipping wizard has been finished then an email notification will be generated and sent to the email address on file, the customer's file will be updated with the shipment information, the payment will be cleared and an Invoice will be created within the customer's account.

Drop Shipping Tips

1. Suppliers who drop ship order can either provide the shipment information by email, web portal or they can communicate directly with the customer and not provide the shipping details. In cases where you may not have the shipping details verifying the order information and completing each order will close out the order an update the customer's account so it shows as complete within Tradepoint.

Tradepoint – Internal Order Processing – Drop Shipped Orders

Drop Shipping is built into the standard order work flow with the fulfillment wizard available for completing drop shipped orders and updating customer accounts with the drop ship information from Suppliers. The over view below describes generating and completing an order that is either a partially drop shipped order or a drop shipped order in entirety.

13. Establish if the customer calling in is already within Tradepoint. Doing a last name search using the Quick Search field in the lower left is the easiest way to find out.
14. If they are not in Tradepoint then no search results will come up. In that case go to Customers and click the New icon in the lower left of the screen to start a new customer account.
15. Once a new customer screen has popped up click on the address icon to enter in the main address. There is a screen within orders to add an alternate shipping address within the orders screen.
16. Add any phone contact and email information on the main contact info screen. (If the customer is an individual and not a business then check off the individual box if it has not been pre-checked)
17. Click on the Order screen and click the New button in the lower right to add a new Order.
18. Within the Orders screen, click the line item row to add products.
19. The product search tool will allow one or more products to be added at once. Enter in a partial or full product name, model number or use the % sign to search by key word. (the % search option ill search across the entire product information for all products with a key word within the product listing)
20. Click the Save button within the product search to add multiple products or double click on a single line item in the product search to add it to the order.
21. Check off the drop ship box next to each line item that will be drop shipped. (this can apply to part of the line items on an Order)
22. Once all products are added choose a shipping method and change the order status to In Production. (Found at the bottom of the screen in the default screen layout.)
23. ***If credit card payment is being processed***, click the Legacy Payment button to process credit card information. The card number, name as it appears on the card, expiration date and 3 digit security code are required for credit card processing. (Card numbers are not stored within Tradepoint, only the authorization number generated from the transaction will be stored)
24. Once the credit card has been authorized, the status will automatically change from submitted to credit cleared, the customer will receive an email notification generated from Tradepoint and a notification will be generated for a new shipment ready for fulfillment.
25. ***If cheque or bank transfer will be payment,*** then change then update the order status to In production, once the payment has been received then the Order will be completed and Invoice with payment applied.

26. An order can be emailed to the customer while on the phone with them using the print button in the upper left. Once in the print preview screen click on the email button to email the order as a PDF.
27. Once an Order with drop shipped items has been saved with the In Productions status, a Purchase Order will pop-up with the items that have preferred Suppliers on the product record. If each item has a different preferred Supplier then more than one Purchase Order will pop up. If there is no preferred Supplier then there will be a prompt to specify a Supplier.
28. Authorize and save each PO to acknowledge it in Tradepoint. When they are closed the related PO information will appear in any orders with Drop Shipped items

Order Options within the Order screen

8. Discounts: These can be given at the line item level or applied to multiple line items by highlighting more than one line item and clicking the Discount button in the top orders tool bar.
9. Choose a flat rate discount, a percentage or choose from an existing price list in the drop down menu. Click the Save button to apply the discount for this Order.
10. An Invoice can be generated for specific line items if highlighted. This is typically used in work flow processes that are different from processing web and phone based orders. (building construction, engineering are two examples)
11. Edit a Bill of Materials. Any products that are a Bill of Materials can be edited by highlighting the BOM product and clicking the Edit Bill of Materials button. The product details will display, make any edits for this particular order and save changes.
12. Screen customization options are under the Layout section to modify the appearance and function of the Order screen. The screen will already be customized by the time a company goes live with Tradepoint.
13. The New Shipment button will start the shipping fulfillment wizard to fulfill all or part of an order from the orders screen.
14. The Send Status Email button will automatically send an Order Confirmation Email to a customer once a credit card has been cleared. This option will likely be automatically set for order processing.

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5. Shipping labels and tracking numbers are generated individually as orders are run through the fulfillment wizard. Highlight an order and click the fulfill icon in the flyout panel.
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8. Click the next button to verify the shipment details. The tracking number will not appear on this screen. It will be generated once the fulfillment wizard is closed.
9. Click the next button to reach the last screen in the fulfillment wizard. Printing options will be pre-checked. Click the finish button to print out shipping labels and update the customer's account.
10. Once the shipping wizard has been finished then an email notification will be generated and sent to the email address on file, the customer's file will be updated with the shipment information, the payment will be cleared and an Invoice will be created within the customer's account.

Tradepoint – Internal Order Processing (New Customers)

There are points within the process that can be done differently depending on specifics for each business. The steps below are the most efficient for processing phone orders within Tradepoint.

29. Establish if the customer calling in is already within Tradepoint. Doing a last name search using the Quick Search field in the lower left is the easiest way to find out.
30. If they are not in Tradepoint then no search results will come up. In that case go to Customers and click the New icon in the lower left of the screen to start a new customer account.
31. Once a new customer screen has popped up click on the address icon to enter in the main address. There is a screen within orders to add an alternate shipping address within the orders screen.
32. Add any phone contact and email information on the main contact info screen. (If the customer is an individual and not a business then check off the individual box if it has not been pre-checked)
33. Click on the Order screen and click the New button in the lower right to add a new Order.
34. Within the Orders screen, click the line item row to add products.
35. The product search tool will allow one or more products to be added at once. Enter in a partial or full product name, model number or use the % sign to search by key word. (the % search option ill search across the entire product information for all products with a key word within the product listing)
36. Click the Save button within the product search to add multiple products or double click on a single line item in the product search to add it to the order.
37. Once all products are added choose a shipping method. (Found at the bottom of the screen in the default screen layout.)
38. An order can be emailed to the customer while on the phone with them using the print button in the upper left. Once in the print preview screen click on the email button to email the order as a PDF.
39. Click the Legacy Payment button to process credit card information. The card number, name as it appears on the card, expiration date and 3 digit security code are required for credit card processing. (Card numbers are not stored within Tradepoint, only the authorization number generated from the transaction will be stored)
40. Once the credit card has been authorized, the status will automatically change from submitted to credit cleared, the customer will receive an email notification generated from Tradepoint and a notification will be generated for a new shipment ready for fulfillment.

Order Options within the Order screen

15. Discounts: These can be given at the line item level or applied to multiple line items by highlighting more than one line item and clicking the Discount button in the top orders tool bar.

16. Choose a flat rate discount, a percentage or choose from an existing price list in the drop down menu. Click the Save button to apply the discount for this Order.
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19. Screen customization options are under the Layout section to modify the appearance and function of the Order screen. The screen will already be customized by the time a company goes live with Tradepoint.
20. The New Shipment button will start the shipping fulfillment wizard to fulfill all or part of an order from the orders screen.
21. The Send Status Email button will automatically send an Order Confirmation Email to a customer once a credit card has been cleared. This option will likely be automatically set for order processing.

Returns and Exchanges

Tradepoint supports both Returns and Exchanges. Returns and Exchanges are processed on Invoices. Any Credit Card payments that have been received can also be processed electronically to return payment to a credit card.

1. Look up the customer who is would like a return or exchange.
2. Click on Invoices and double click on the Invoice that is being returned or exchanged.
3. Click the return/refunds/exchanges button to start a return/exchange.
4. The screen will show each line item that was purchased. Choose a Type(this will be a reason for the return/exchange)
5. If only one item is being returned/exchanged then delete the other line items from the Invoice. Tradepoint will assume all line items will be returned/exchanged when the screen is opened.
6. Choose the type of transaction for each line item in the drop down menu. The options will be refund, return or exchange. Each of the fields will have a field for the product that was on the Invoice and then a product for any details about an exchange
7. If its an exchange then specify the product that is being exchanged.
8. There will be fields on here that relate to Packaging (Custom Fields) and Units of Measure. These will only be relevant if the products being returned/exchanges have those properties as a part of the product listing. The fields can be removed from the screen layout if they are not relevant to your work flow.
9. Specify the Units, Cost and Quality. For Quality there is a drop down menu to specify the condition of the products being returned/exchanged.
10. Check the Complete box in the lower right to complete the return/exchange.
11. Click the New Repayment button in the upper left to generate an electronic based repayment.
12. Specify the original payment and the amount in the payment screen.
13. Choose the payment method (usually the original payment method) for the repayment and enter in any credit card details. Once the Save button is clicked the electronic payment will process. The authorization number will post in the return/exchange details on the Invoice screen.
14. If the repayment is going to be by check then choose the cheque payment method and save the credit memo.

Purchasing

Generating Purchase Orders can be done based on alerts generated from the Flyout Panel or built in preferences for inventory safety levels (maximum and minimum levels). Below is an over view of the steps to generating purchase orders based on order activity prompted by alerts when inventory reaches the minimum levels.

1. Under the tools tab there is a button for Stock Analysis. The Stock Analysis tool will easily bring up the Inventory usage for a given data range.
2. A two week date range will default in the Stock Analysis tool. This can be changed if purchasing is covering a longer range. Update the date range and click the search icon in the lower left.
3. All the products and their usage will appear on the screen. The far right column will be a suggested reorder amount.
4. Highlight more than one row by holding down the Control key and clicking each product that should be re-ordered.
5. Click on the Order Selected button in the upper left. If each product selected has a preferred Supplier then the Purchase Order/s will be generated automatically. I a preferred Supplier is not on a product then a prompt will pop up to choose a Supplier.
6. The Purchase Order/s will pop up. Finish the purchase order by choosing a Shipping Method, Authorizing and Ordering the PO and emailing out a PO to the Supplier. (Any Shipping Method will only be estimated on a PO, Supplier Bills will be final for shipping costs)
7. Once a PO has been ordered and emailed out to a Supplier it will go in the que for receiving .

Receiving

Receiving happens through the Warehouse section in Tradepoint. Receiving can be based on existing purchase orders or a purchase order can be generated at the point of receiving in a Warehouse.

1. Click on the Warehouse from the Home tool bar.
2. Click on the quick find tool to open the Warehouse and click on the Receive button in the lower left .
3. A wizard will open with a few screens to verify what is being received.
4. On the first second screen there will be a choice of choosing from an existing PO or creating one as you go.
5. Click on the Pending Shipments and the drop down menu to choose which pending PO to receive.
6. Once a PO has been chosen click the next button. The items on the PO will appear in the next screen.
7. The items will appear on the following screen. If all items are there then click the Receive All button in the lower right.
8. If part of the items on the PO are being received then update the quantity to reflect what is being received. Any items that have not been received will keep the PO open until all items have been received. Enter in any damaged or unexpected items on this screen.
9. Click the Next button. Any damaged or unexpected items from the last screen will appear here. Click the next button.
10. The final screen will have an option to enter in a reference number for this shipment and an option to generate a bill for an incoming shipment.
11. Once the Finish button is clicked the inventory levels will be updated and the PO will be completed. Any Bills will also be generated Save and close (without completing the Bill) to come back to the Bills with final details later.

Using the Bill Pay Wizard

Paying multiple Bills at once can be done using the Bill Pay wizard. Any Completed Bills within Tradepoint can be paid at once for multiple Suppliers.

Bills must be completed before they will appear in the Bill Pay wizard.

1. From the Home Tab click on the Accounting icon.
2. Click the 'Pay Bills' icon in the top tool bar.
3. Follow the prompts within the wizard using the Next button in the lower right of the screen.
4. On the second screen within the Pay Bill wizard all the completed bills will appear. Click the Payment Type field to specify the Payment Type. Additional payment types can be setup using the Setup and Configure tool.
5. Choose a payment method for each Bill to be paid.
6. Enter in the Starting check number to pay the Bills by check. Tradepoint will use the next check number for each line item from top to bottom in the Bill Pay wizard.
7. Click the Next button to pay the Bills.
8. The print preview screen will appear with the checks that will be printed. If there is more than one check template within Tradepoint you will be prompted to choose one.
9. Print out the checks and close the print screen.
10. Click the Finish icon in the lower right to post the payments with check information to the Bills.

Deposits

Deposits will automatically be tracked into Tradepoint as transactions happen. Since most of your payments will be from cheque or bank transfer the deposits tool will assist in posting these deposits within Tradepoint.

1. Click on Accounting from the Home tab.
2. Within the Accounting section click on the Deposits icon.
3. Any outstanding deposits will be visible in this screen.
4. Choose a payment type.
5. Choose an account to deposit it to.
6. Use the Check All button to check all payments or check off specific items to be deposited.
7. The print button at the bottom will print out a record.
8. Save the Deposit. The Deposit will be posted to the specified account in Tradepoint.

Journal Entries

Journal Entries are used for account to account transfers, recording expenses and Supplier payments made by credit card (some of the most common examples).

1. From the Home tab click on Accounting.
2. Click on the Transfers screen.
3. Enter in the date of the Journal Entry and any notes in the notes fieldf.
4. Enter in the account that will be credited from the drop down menu under G/L Account and the amount that will be credited.
5. Enter in the account that will be debited in the G/L field and the debit amount (more than one account can be specified as long as the credits and debits match).
6. Click the Save button in the lower right.
7. To reverse a journal entry simply repeat the steps with the transaction details reversed. This will cancel out a previous journal entry.

VAT Reporting

Activity with any VAT associated with it will automatically be tracked within Tradepoint. The reporting options will produce a report with payables and receivables with details for each transaction where any VAT was associated.

1. From the Home tab click on Accounting. Within Accounting click on Sales Tax Reports.
2. Under Sales Tax Reports click 'New Sales tax Report' in the lower right.
3. On the report screen that will open choose the VAT rule to report on from the drop down menu.
4. Specify the report dates for the VAT report.
5. A print option is at the top of the report with a detailed and non-detailed default report template. The customize option is available for the report.
6. Click the save and close button to save your report.

Accounting Period Closeouts

1. From the Home tab, click on the Accounting button.
2. Click on Accounting Periods.
3. Within the Accounting Period screen choose the current accounting period and change the status on the left hand field option (there are three options in the drop down menu Open, Accountant only, and Locked)
4. Choose Accountant only for a user with admin priviledges to enter in the last of the transactions for that Accounting Period. Choose locked when the accounting period has been closed out.

Creating New Web Pages

Using Tradepoint to create new web pages is defining the web site and url information for the static pages on your web site. This is different from product pages, KB articles and Press Releases which create the page information as the content is uploaded within Tradepoint.

Web pages defines the page information in relation to the page being created and then allows you to upload the content as necessary.

1. Under the tools tab there is a button for Web Sites. This is where the web site information can be created and uploaded.
2. The main page when opening will show the primary web site information that will be referenced for each of the pages created. To create a new page click the 'Pages' button in the top tool bar.
3. *Any existing pages will be listed here on the right side of the screen.* Next click the 'New Page' button in the lower right corner.
4. You will be directed to the screen where the referencing url information will be for the web page being created. Enter in the Page url and Template page url information. For the page url only the last piece of information on the entire url needs to be entered.
   For example, in this url only the last piece of information after the slash has to be entered: http://www.tradepoint360.com/industries/directsales.aspx
5. Enter in the page template. These will be provided for you when your web site is setup but will most likely be something like: /templates/sitehelptemplate.aspx or /templates/template1.aspx
6. In the filed for Language click the All option which will appear when clicked. *Most websites will be localized into one language but for web sites localized into more than one language more than one option will appear in this drop down.*
7. Fill in content for the Short Description, Page Title and Long Description. These fields will build the tags into each page and information entered here will be what appears within Search Engine results for organic searching.
8. To enter in New Page content click the Content icon in the top tool bar. A screen will open for adding the content.
9. Click the 'New Tag' icon in the lower left corner and in the 'Key' field at the top center of the main window enter in Content (capital 'C' with no space before or after the word)
10. Enter in the content by copying and pasting or enter in by hand.

Please Note: When pasting content from external sources please use Notepad to remove formatting. Any content used from MS Word or OneNote will often have formatting embedded which can cause inconsistencies with appearance in text.

Creating New Knowledge Base Articles

Using Tradepoint to create new knowledge base articles is an easy way to create self-service resources for customers and people who visit your web site

Each Knowledge base article is its own web page with page descriptions and keywords that can be updated as necessary

1. From the Home tab click the Knowledge icon in the top tool bar.
2. This will open any and all KB articles that exist within Tradepoint. To create a new KB article click the 'New' icon in the lower left.
3. The main screen will have all of the options necessary for creating a new article and setting the related information for how the article displays on your web site. The required items for a new KB article will be the Subject (or name of KB article), Local Security (who within Tradepoint can see the article), Web Security (which type of users can see the KB article on your web site), Category and a Teaser (Short Description that will display on web site search results.
4. Enter in the Subject or Name of KB Article.
5. Check off the correct boxes for Local and Web Security. For everyone to view this article check off the 'All' option in both boxes.
6. Choose a Category for the article to be associated with. To create new Categories click the Green + button and add the Categories in the Setup and Configure Tool. Once Categories are added there they will show up in the Categories section when a New KB article is created.
7. Products can be linked to KB articles using the Products option on the right of the screen. This will create a link to the chosen products when the article is displayed on the web site.
8. Content can be added or pasted into the main content screen. We advise using Notepad for content being pasted from external sources such as MS Word. The bottom of the content screen has a 'Design' and 'Source' tab.
   For those who want to enter in content in HTML directly use the 'Source' tab at the bottom left of the screen. Any content entered in the 'Design' field will have the HTML automatically created on this tab.
9. Click on the 'Teaser' icon in the top tool bar to add the Short Description which will display in search results.
10. Click the 'Web Optimization' icon in the top tool bar to enter in keywords, a page description and page title for organic search engine results.
11. If there are related articles they can be specified through the Related Article icon in the top tool bar.
12. Documents can be added to KB articles using the documents icon in the top tool bar.
13. Click the Save icon in the lower left to Save and Post the article to the web site.

Notes:

To add or reference images to articles use the image icon in the editor's tool bar in the top of the screen. Clicking the icon will open a screen to either add the referencing web address for an image or search for the location of an image file.

To add or create hyperlinks use the link icon in the editor tool bar at the top of the page. A screen with preferences for the url, description, an anchor title for the link display and preferences for how the link opens when someone clicks on it.