Create Sales Documentation

Jennifer M - 2021-08-26 - Getting Started

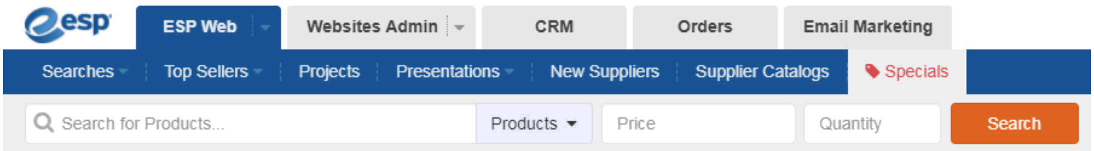
Creating Sales Documentation

What type of sales document do you want to create?

Master Order

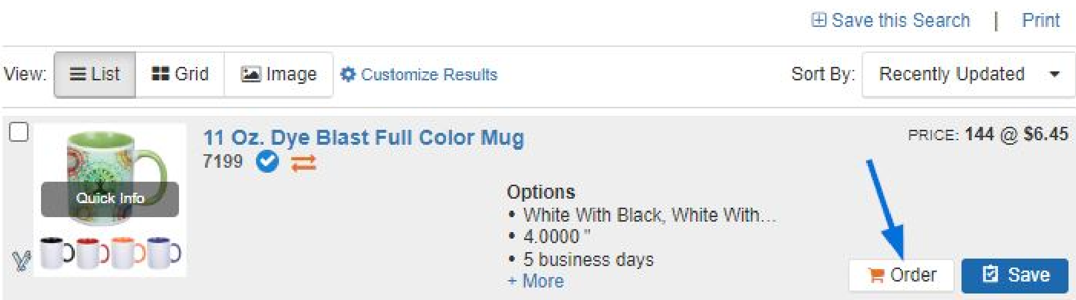
From an ESP Web Search

To create an order using a product from an ESP Web search, type a keyword or product number in the Search for Products bar and then click on the Search button.



You can also click on the Open Advanced Search link to enter additional criteria about the product, as well as use the links in the guided navigation to narrow your results.

After locating the item, hover on the listing and click on the Order button.

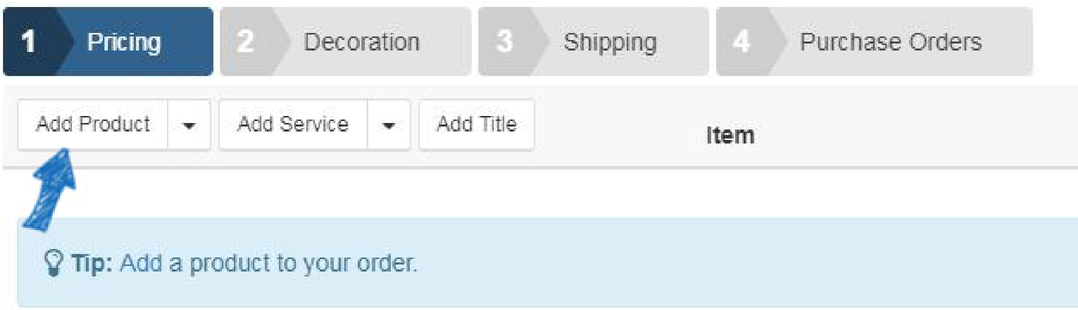


Then, you can configure the product for ordering.

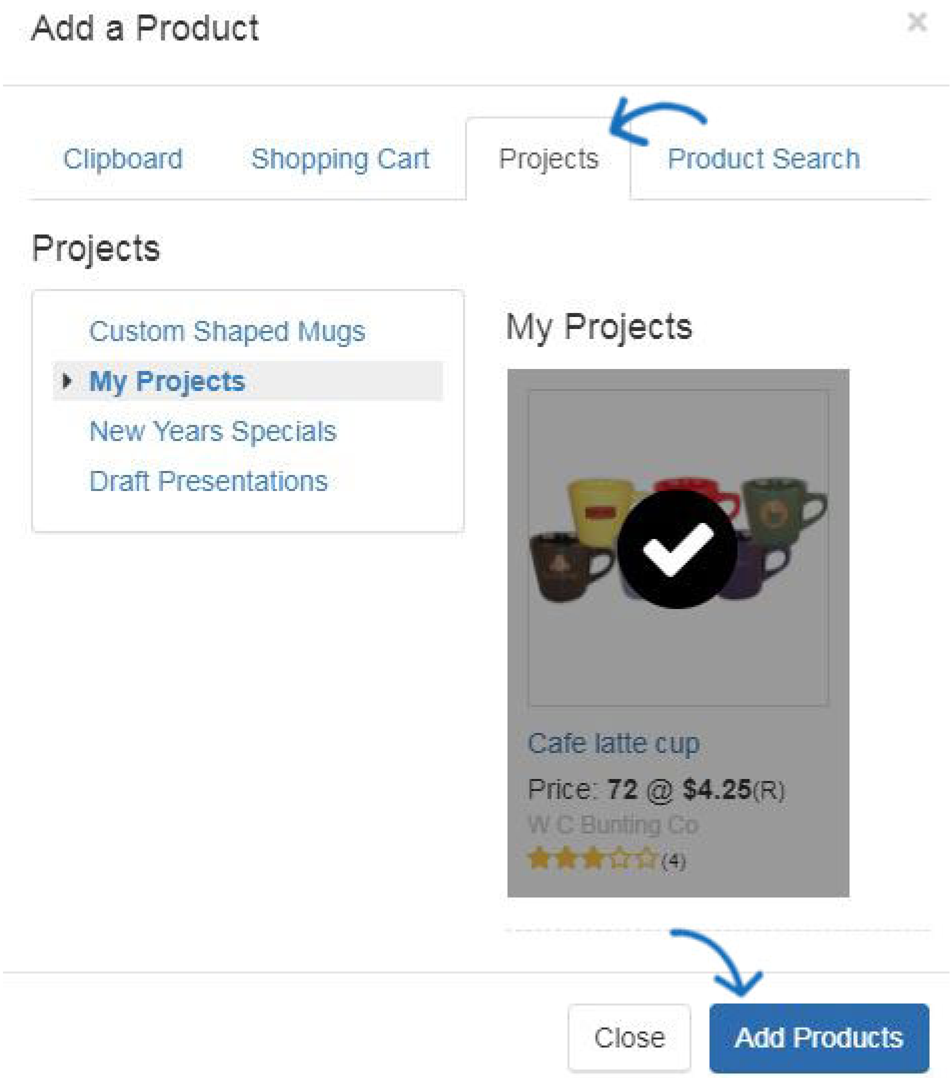
From the Clipboard, or Client Project

To create an order for a product that has been saved to the Clipboard or within a Client Project, click on the Orders tab and then click on the Create Order button.

Then, in the order form, click on the Add Product button.

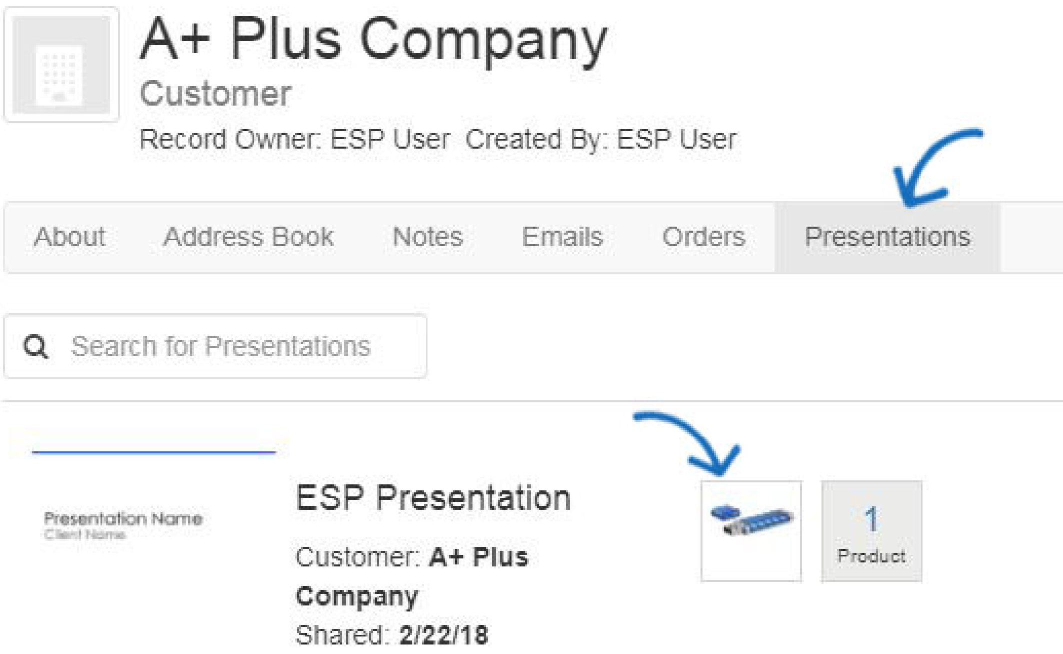


Locate and select the product from the appropriate tab. Then, click on the Add Product(s) button.

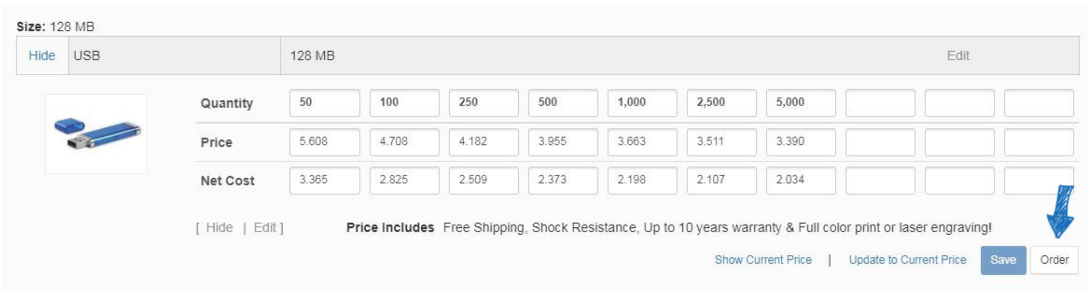


From an ESP Presentation

To create an order using a product from a customer presentation, click on the CRM tab. Click on Customers and locate your customer. Then, click on the customer listing to access the details. Click on the Presentations option and locate the item you would like to use in the order.



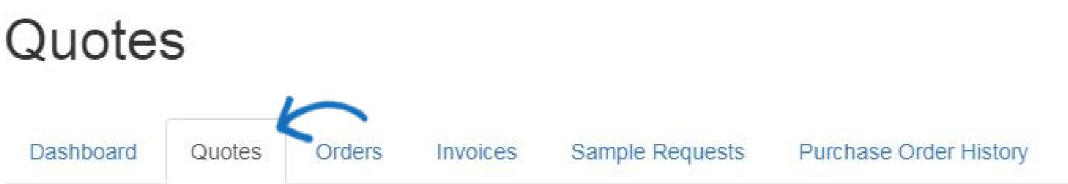
Next, click on the Order button below the price grid.



Then, you can configure the product for ordering.

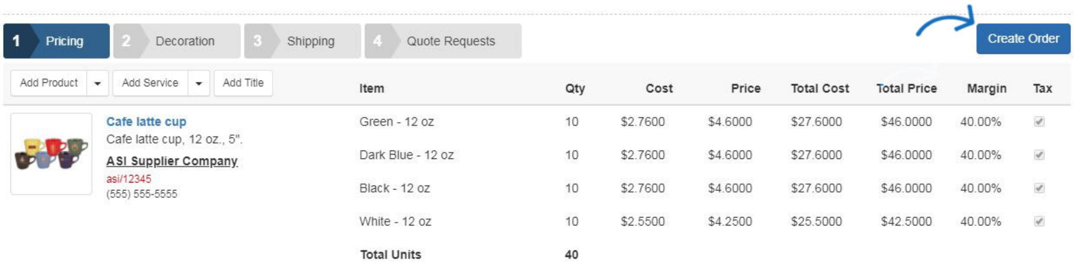
Generate an Order from a Quote

To generate an order from a quote, click on the Quotes tab from the ESP Orders homepage.



Next, click on the quote number to open the quote.

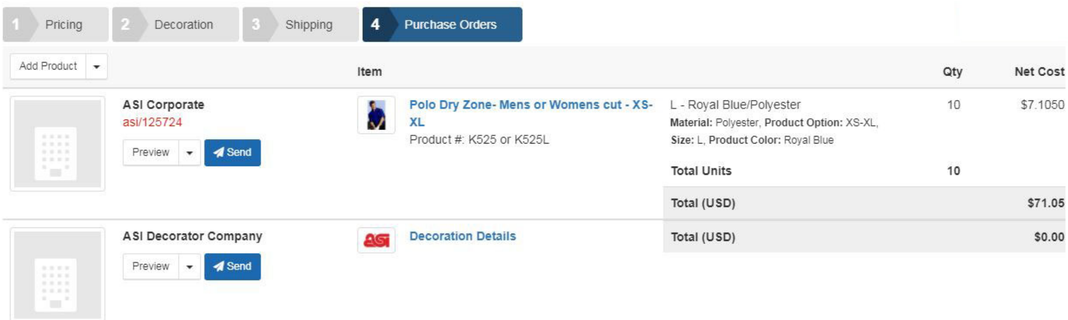
Above the product listing and pricing section of the quote, click on the Create Order button.



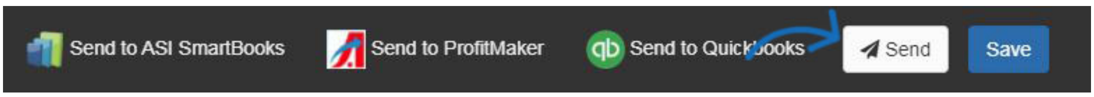
You will see a green success bar and a new order will be created. To access, edit, and send the order, return to the ESP Orders homepage. Then, click on the Orders tab. The newly generated order will be available and you can click on the order number to open the order. Then you can complete the order form.

Purchase Order

Purchase orders can generated from within the master order, so no re-keying is necessary. Within the order, click on the Purchase Orders tab to preview the order information.



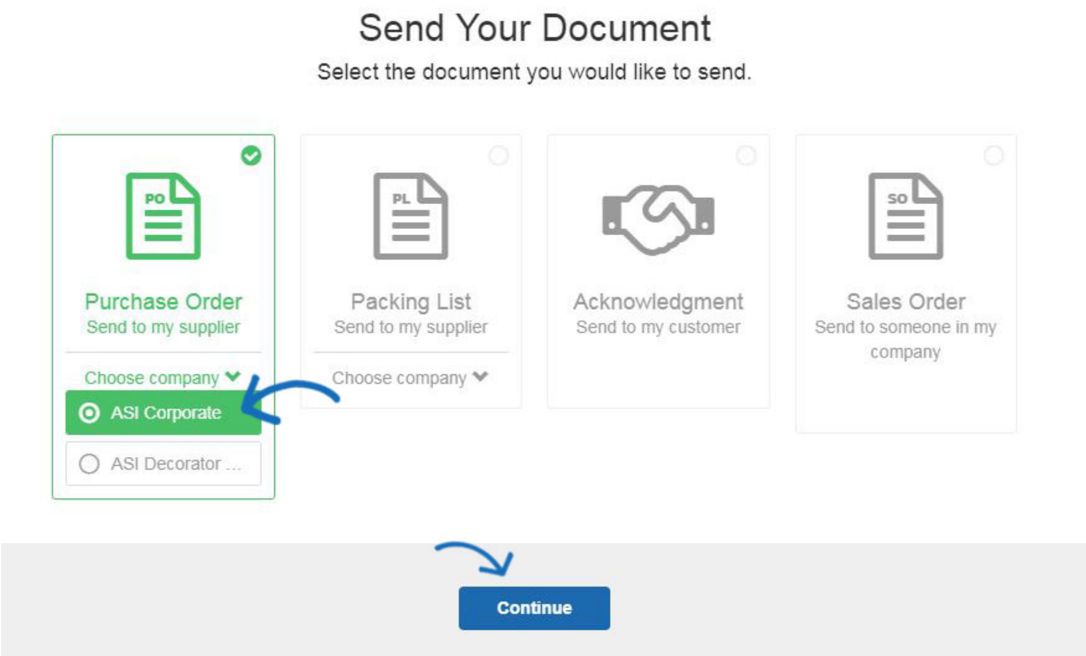
You can click on Preview prior to view the purchase order prior to sending. The preview will open in a new tab, one you are finished looking over the preview, close the tab to return to the order. When you are ready to email the purchase order, click on the Send button. If you are not ready to send, you can click on the Save option and will be able to send at a later time.



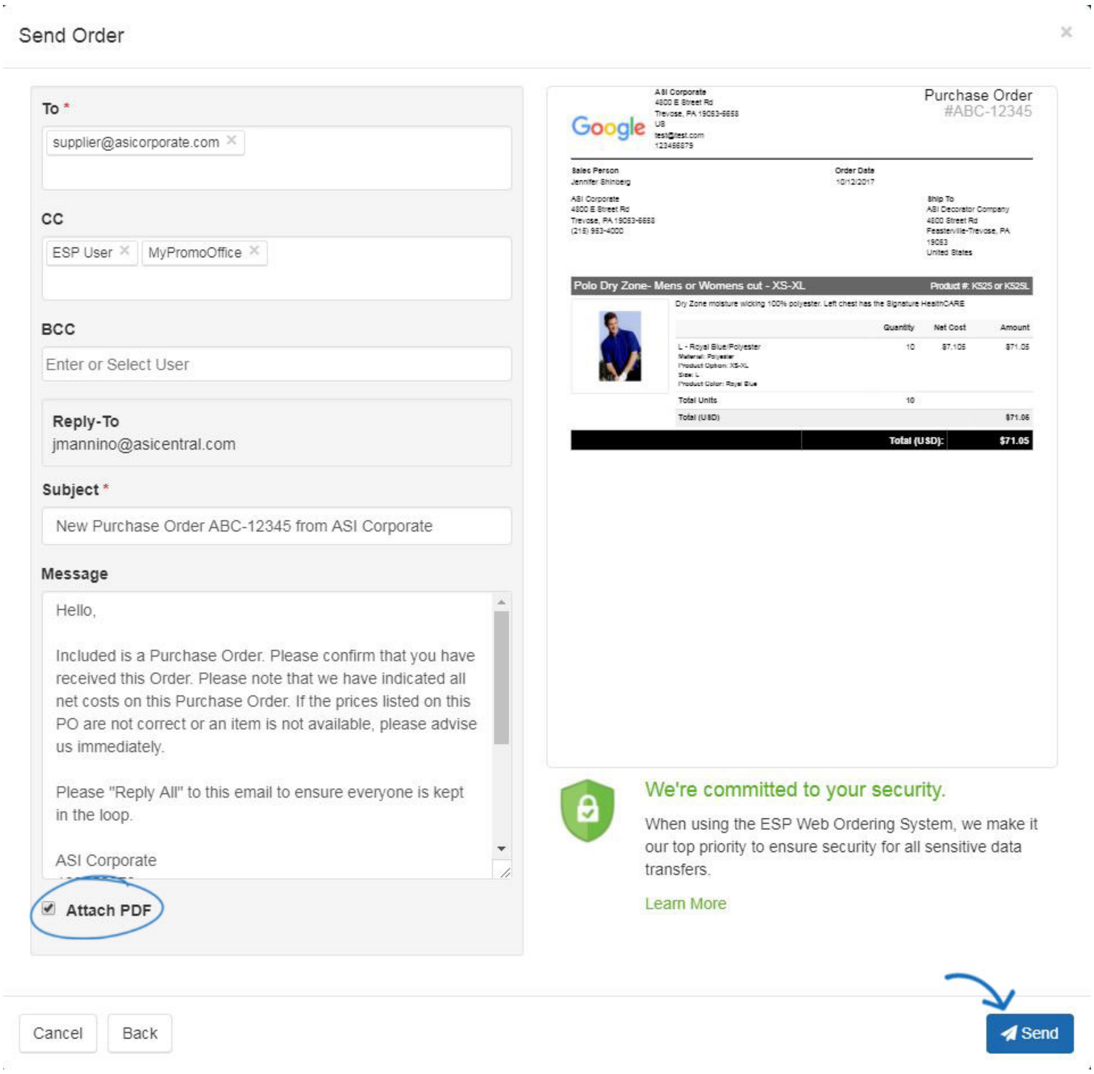
In the Send Your Document window, hover on the Purchase Order option and select the company for which you would like to generate the purchase order. If your order contains more than one supplier, you will be able to generate individual purchase orders for each supplier. In the example below, there are two purchase order options because the items have been set to shipped from the supplier to a decorator and then to the customer.

Separate purchase orders can be generated and sent for both the supplier and decorator.

Then, click on Continue.



A preview of the purchase order will display. You can use the available options on the left to manage the sending options, including the email subject line and message. To customize the logo or email text for documentation, you can use the options in the ESP Admin section for Document Design. If the PDF Attach box is checked, a PDF version of the purchase order will be attached to the email.

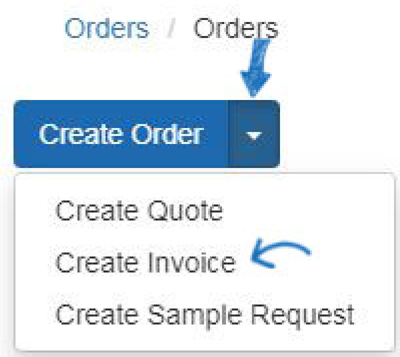


Once you have reviewed the information, click on the Send button. You are then able to review the status of the purchase order using the Purchase Order History area of ESP Orders.

Invoice

Create a New Invoice

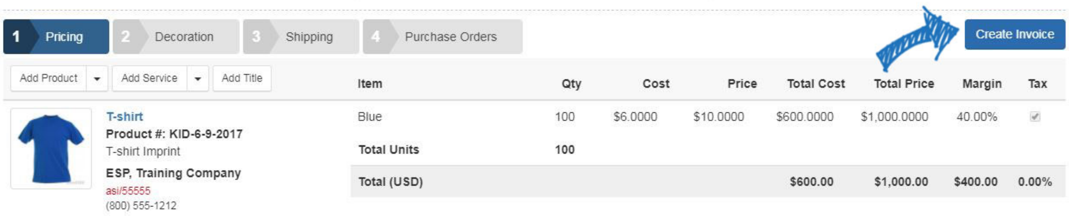
To create a new invoice, click on the arrow next to the Create Order button and select Create Invoice.



Then, begin filling in the order form.

Generate an Invoice from an Existing Order

To generate an invoice from an existing order, open the order and go to the pricing area. Scroll down to where the products are listed and click on the Create Invoice button.

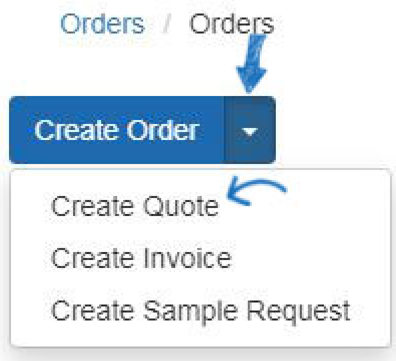


The Create Invoice button will open an invoice that is linked to the sales order. All of the information from the sales order will carry through to the invoice, but you are able to edit any information you like.

Quote

Create a New Quote

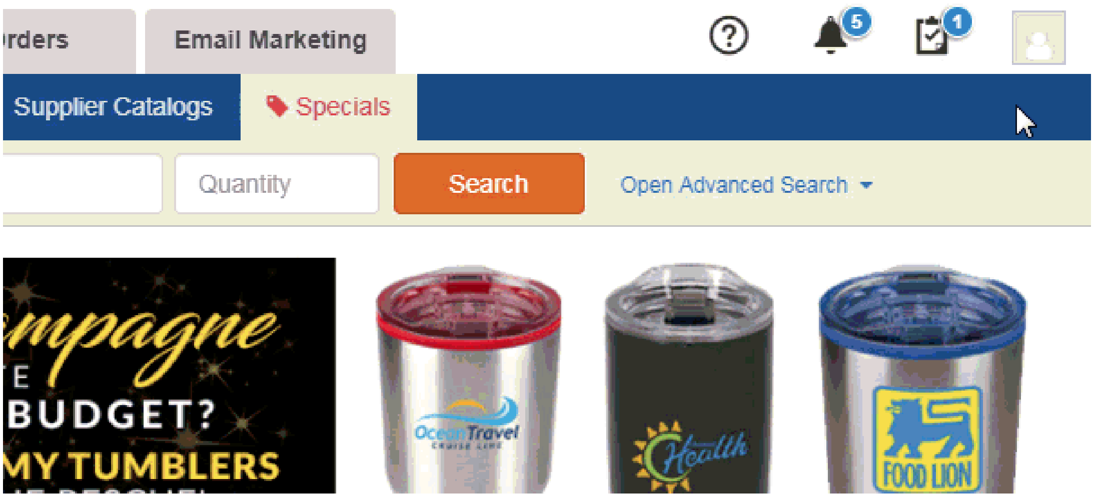
From the ESP Orders homepage, click on the arrow next to the Create Order button and select Create Quote.



Then, [fill in the order form](#).

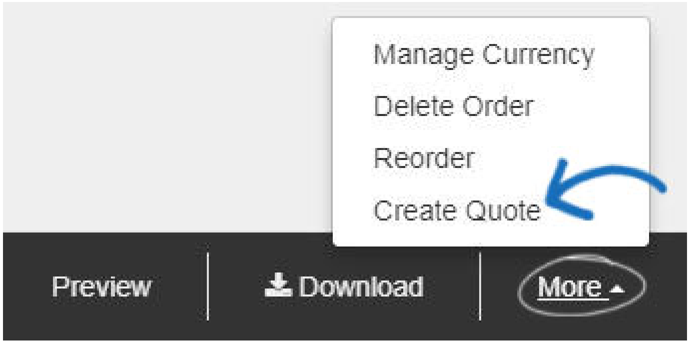
Use a Product from the Clipboard

To create a quote from the Clipboard, mark the product and then use the arrow on the Order button to select Create Quote.



Generate a Quote from an Existing Order

To create a quote from an order by clicking on the More option at the bottom of the order and selecting Create Quote from the available options.

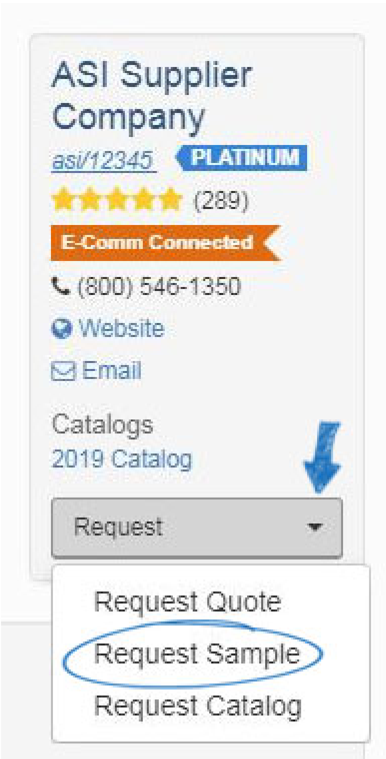


Then, fill in the order form.

Sample Request

Create Sample Request from ESP Web

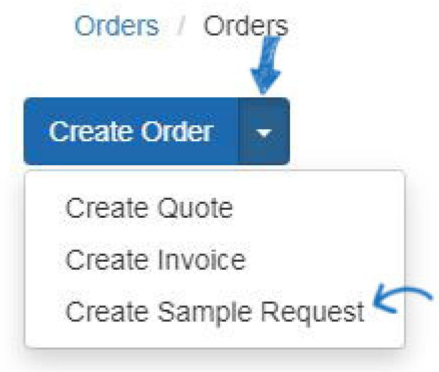
To request a sample of a product, locate the product in ESP Web. Then, click on the product name to open the detail page. On the detail page, use the arrow next to Request and select Request Sample from the dropdown.



The sample request form contains the same fields as an order. Fill in the sample request just as you would an order.

Create a New Sample Request

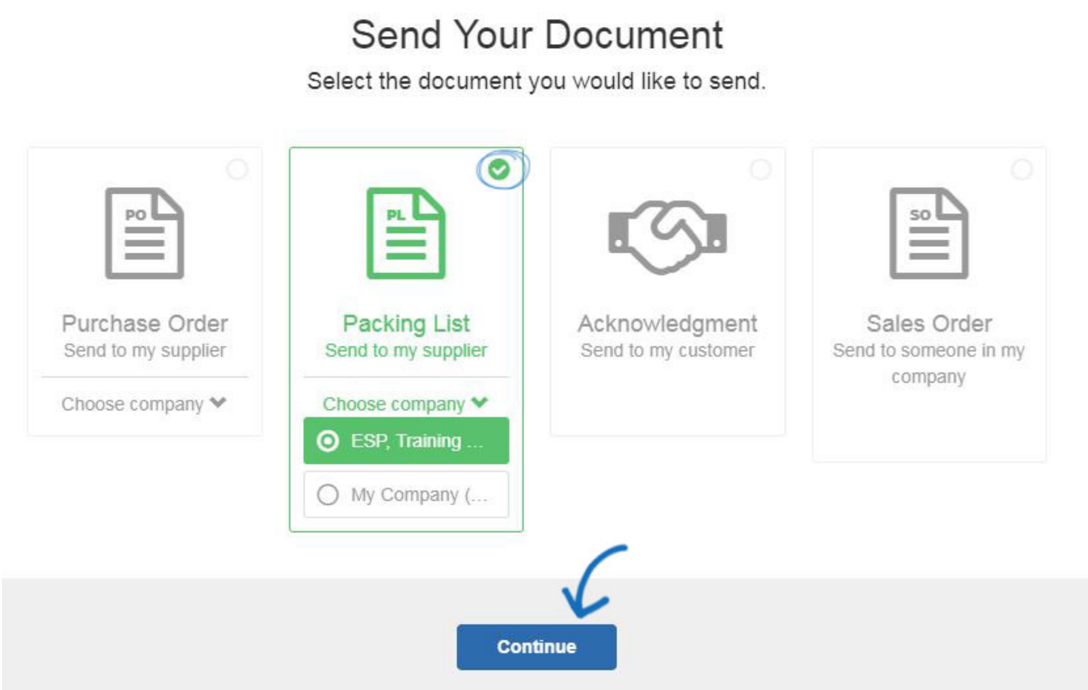
From the ESP Orders homepage, click on the arrow next to the Create Order button and select Create Sample Request.



The sample request form contains the same fields as an order. Fill in the sample request just as you would an order.

Packing List

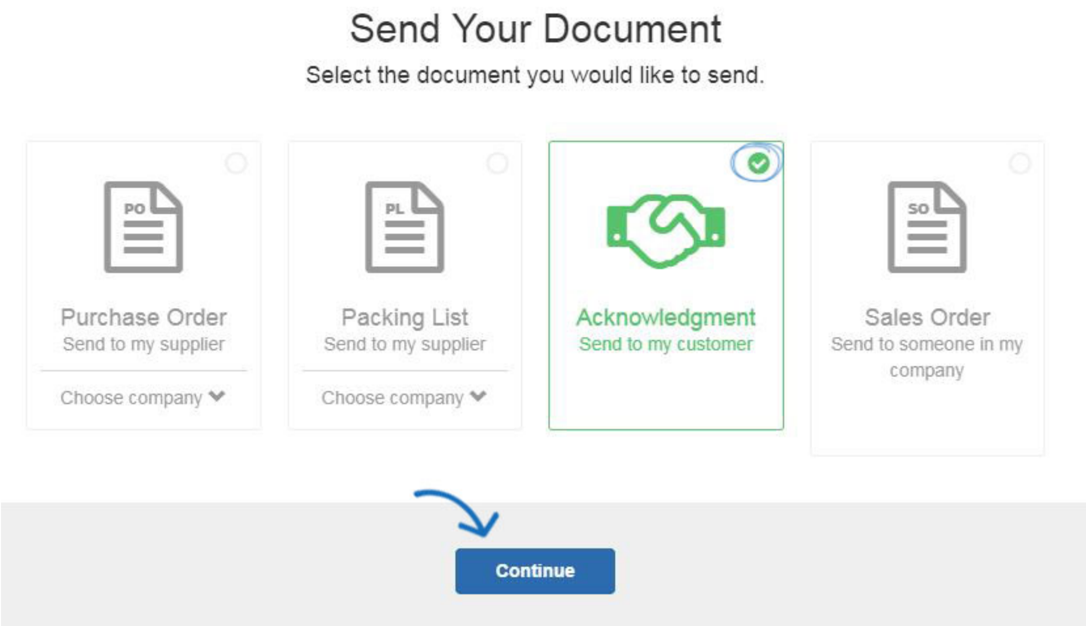
Packing lists can be generated from a master order. After the master order has been completed, click on the Send button. Then, in the Send Your Document window, select Packing List and then click on Continue.



Review the email information on the send page. All fields are can be customized and a preview of the packing list will be displayed. To include a PDF attachment of the packing list in the email, check the Attach PDF box. If all of the information is correct, click on the Send button.

Acknowledgement

Acknowledgements can be generated from a master order. After the master order has been completed, click on the Send button. Then, in the Send Your Document window, select Acknowledgement and then click on Continue.



Review the email information on the send page. All fields are can be customized and a preview of the acknowledgement will be displayed. To include a PDF attachment of the acknowledgement in the email, check the Attach PDF box. If all of the information is correct, click on the Send button.

I'm not sure.

This are the types of order documentation you can create:

- Master Order: Contains all information about the product, customer, dates, and supplier. All additional sales documentation can be generated from this document.
- Purchase Order: The sales agreement between a distributor and a supplier.
- Invoice: The list of goods and/or services rendered to the customer, including outstanding amounts owed to the distributor. Essentially, this is the bill distributors send to their customer.
- Quote: An estimation of costs for goods and/or services to be provided. Distributors can create quotes for their customers, as well as request quotes from suppliers through ESP Orders.
- Sample Request: A sales document sent from the distributor to the supplier asking for a small quantity of a product prior to placing an order.
- Packing List: A document detailing the contents of a package.
- Acknowledgement: Written confirmation detailing the specifications of the order.