

# SmartScan

*By Baus Systems*

## *Sales Order Verification*

An instructional and reference overview of  
using SmartScan Sales Order Verification  
with QuickBooks



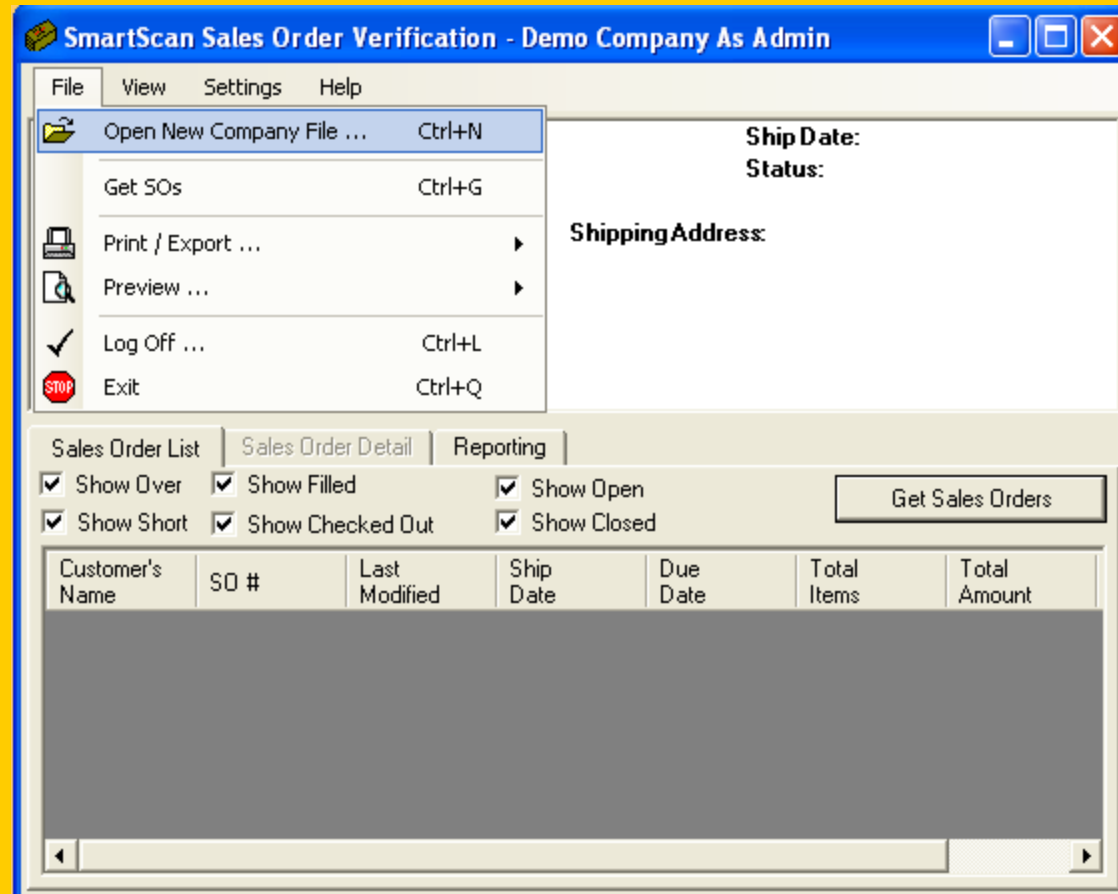
See system requirements for version information



# SmartScan

## Sales Order Verification

*Start by selecting the QuickBooks company file.*



# SmartScan

## Sales Order Verification

SmartScan Sales Order Verification - Demo Company As Admin

File View Settings Help

Customer's Name: SO Number: Billing Address: Ship Date: Status: Shipping Address:

**Get Sales Orders**

By Date By SO #

Enter date range for sales orders.

From Date: 8/20/2008 To Date: 8/21/2008

Ok Cancel

Get Sales Orders

Customer's Name Total Amount Status

Click on **“Get Sales Orders.”**

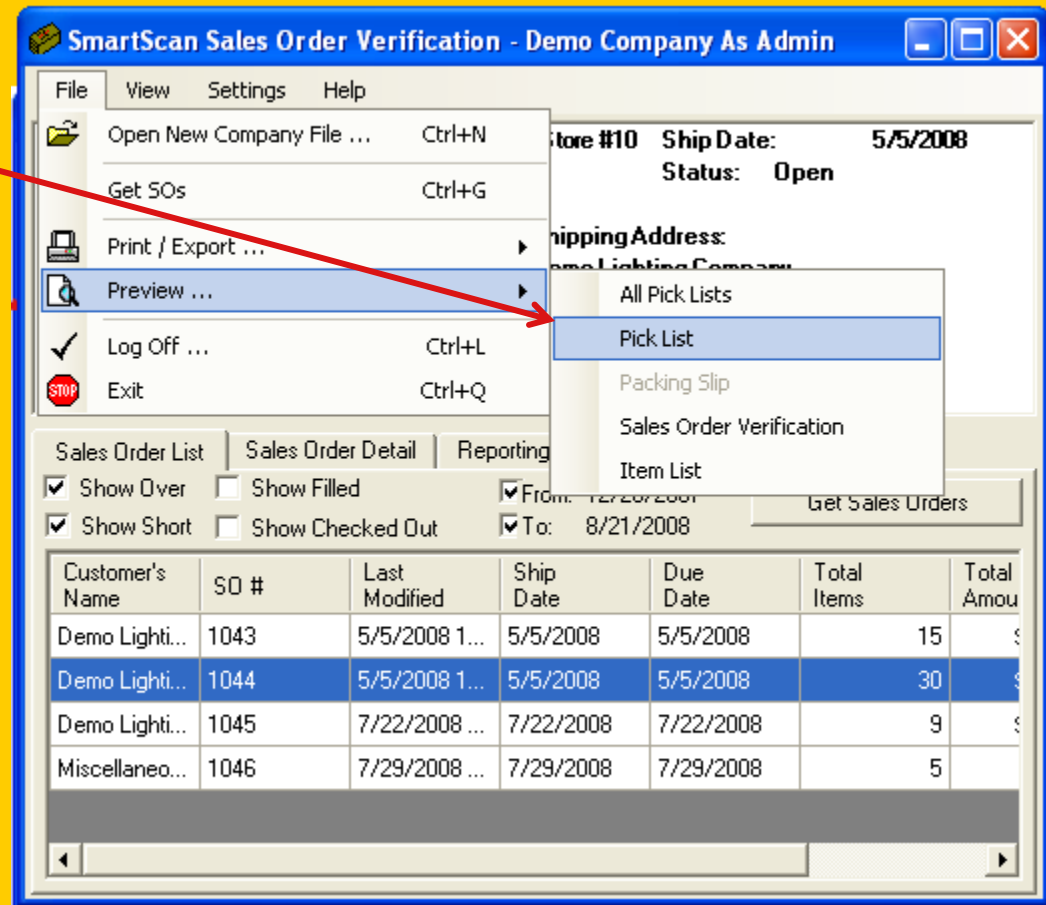
Select the **date range or sales order number** to receive.

# SmartScan

## Sales Order Verification

*When the Sales Order list appears you can choose to print one pick list for the selected invoice or all the pick lists for the Sales Orders shown.*

**Mobile Invoice Verification** will give you an electronic pick list that can be sorted by item name, description or location. (This will be shown later.)



# SmartScan

## Sales Order Verification

Pick List			
SO#: 1044		Yim Yi Import, Inc	Ship Date: 05/05/2008
		Customer: Demo Lighting Company:Store #10	
Qty	Item	Description	Location
10.00	Bulbs:H41930SP	Halogen, 20 watts	Bulbs:H41930SP
10.00	Bulbs:HY20CL/MC	Cand. Light, 20 watts (8 pack)	Bulbs:HY20CL/MC
10.00	Bulbs:MSD200	100 watt (6 pack)	Bulbs:MSD200

*The Pick List is sorted by the location you assign in a QuickBooks custom field.*

Pocket\_PC

File Zoom Tools Help

Scan 3:09 ok

Location	Remaining	Scanned
Hardware:Lk Doorknobs	1	0
4N2 L1	1	0
Wood Door	1	0
5H1 69	1	0

Hardware:Lk Doorknobs

Locking interior doorknobs

1 2 3 Qty: 0

4 5 6 Add

Product Code

Description

✓ Location

Show Filled Lines

Done

View Sort Detail



*The **mobile** Pick List is displayed on the handheld screen and is sortable by Item name, description or location.*

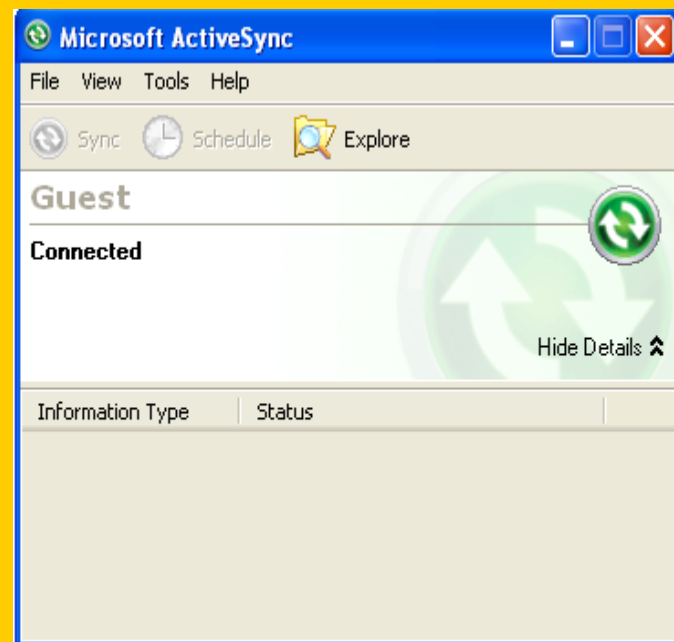
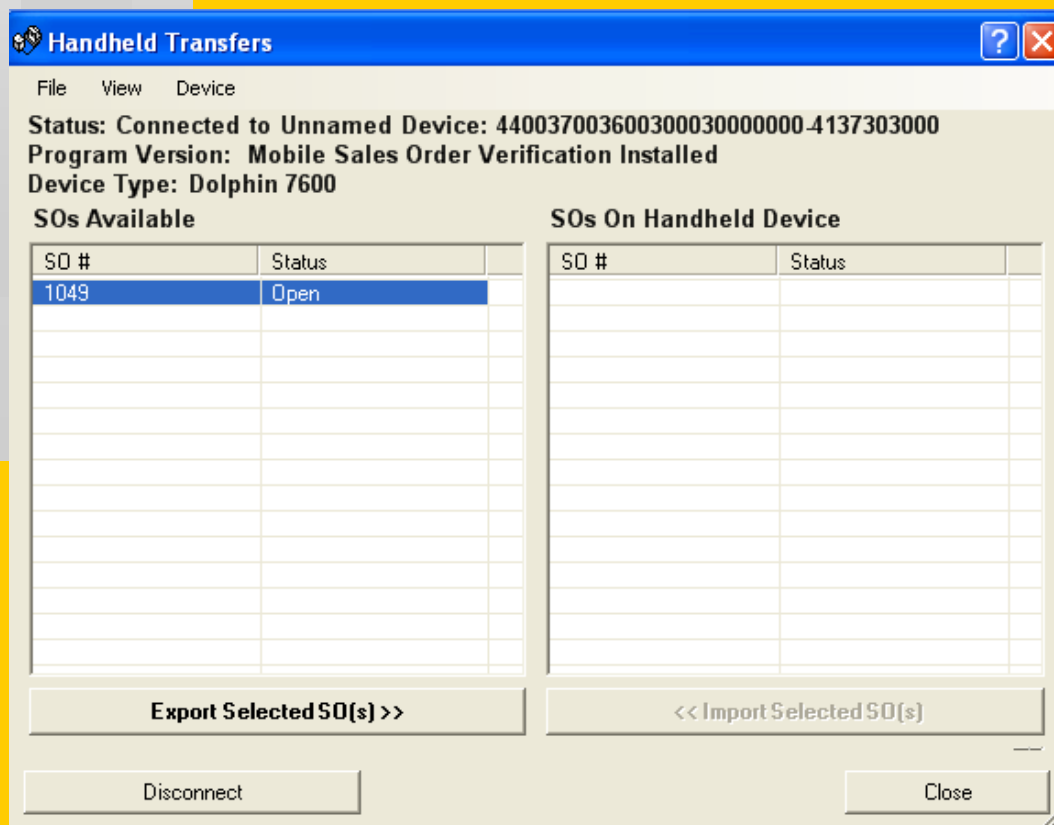


# SmartScan

## Sales Order Verification

***Transfer** your Sales Orders to a Mobile PC Scanner*

*Desk top computer is linked to mobile device via **Microsoft ActiveSync***



# SmartScan

## Sales Order Verification

SmartScan Sales Order Verification - Demo Company As Admin

File View Settings Help

Customer's Name: Demo Lighting Company:Store #10  
SO Number: 1044

Ship Date: 5/5/2008  
Status: Open

Billing Address:  
Demo Lighting Company  
1234 First Street  
Famousville, CA 90123

Shipping Address:  
Demo Lighting Company  
Store #10  
1010 Elivs St  
Famousville, CA 90123

Sales Order List Sales Order Detail Reporting

☐ Add Scan Qty: 1.00 Scan Code: Bulbs:HY20CL/MC

☒ Remove

Item Name	Description	Status	Location	Barcode	Qty Ordered	Filled Qty	ScanQty	To be Filled
Bulbs:H419...	Halogen, 20...	Filled	Bulbs:H419...	086600230...	10	0	10	10
Bulbs:HY20...	Cand. Light,...	Short	Bulbs:HY20...	041163511...	10	0	9	10
Bulbs:MSD...	100 watt (6 ...	Over	Bulbs:MSD...	041196891...	10	0	11	10

Errors: ☒ Only Show Errors That Have Not Been Cleared

Item	Message
Bulbs:MSD200	Line Is Over

To fulfill the order click on the **Sales Order Detail tab** and start scanning items in any order.

If too many or the wrong item is scanned a notification will appear.

# SmartScan

## Sales Order Verification

SmartScan Sales Order Verification - Demo Company As Admin

File View Settings Help

Customer's Name: Demo Lighting Company:Store #05      Ship Date: 5/5/2008  
SO Number: 1043      Status: Open

Billing Address:      Shipping Address:  
Demo Lighting Company      Demo Lighting Company  
1234 First Street      Store #05  
Famousville, CA 90123      555 E. Branson St  
Famousville, CA 90210

Sales Order List   Sales Order Detail   **Serial Numbers**   Reporting

Serial Numbers      Bulbs:F20T12CW      Qty: 1

Value  
P07428012826

Scan Value: P07428012826

Status: Short  
Qty Ordered: 5  
Filled Qty: 0  
ScanQty: 1

☐ None   ☒ Serial Numbers   Delete

Errors: ☒ Only Show Errors That Have Not Been Cleared

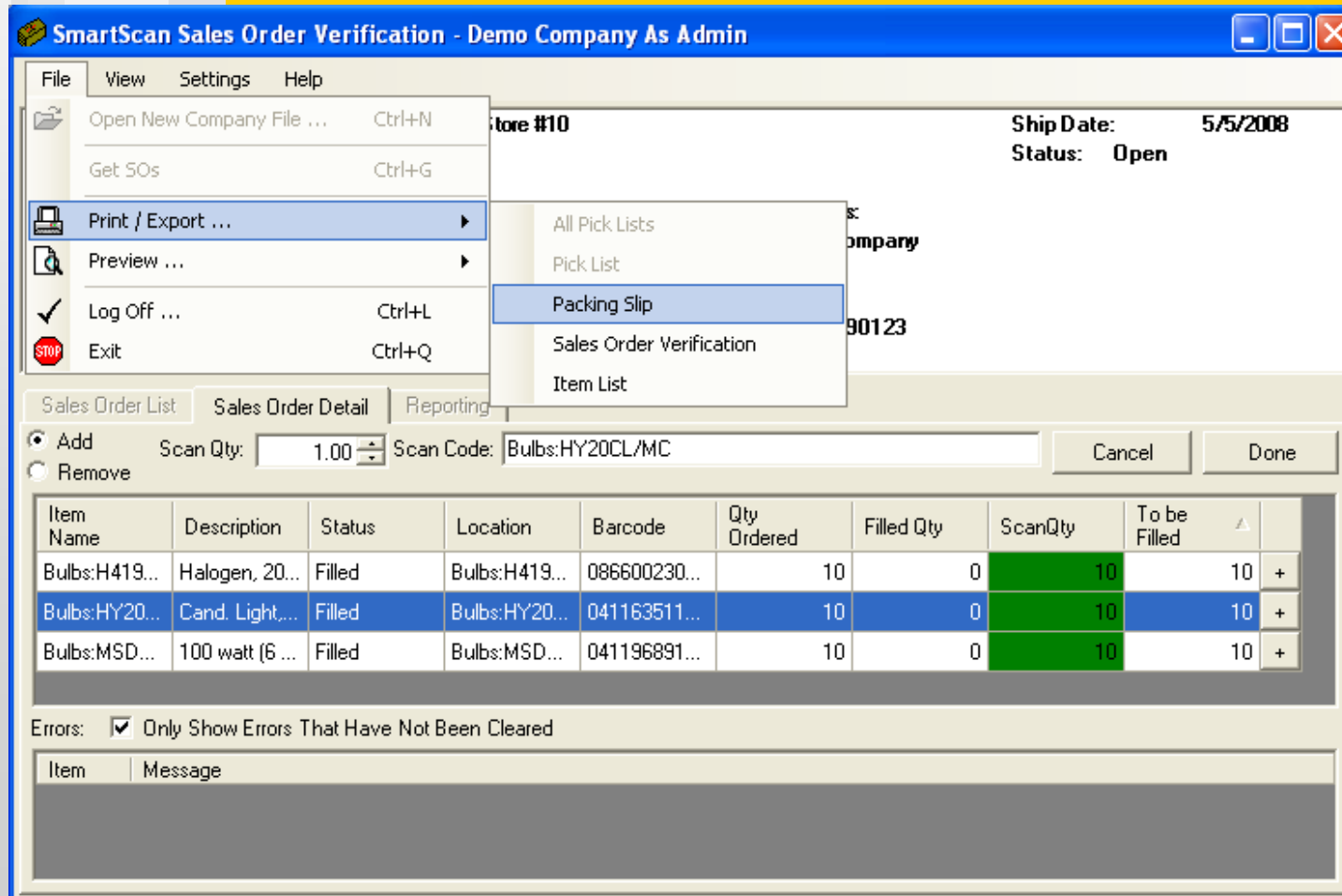
Value	Message
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*To assign serial numbers, either scan all items or one at a time then click the Serial Numbers tab. Scan or type in the serial number then press enter.*



# SmartScan

## Sales Order Verification



*When the order is fulfilled and ready to pack, print a Packing Slip before clicking "Done."*

*Settings can be changed to print a Packing Slip Automatically.*

# SmartScan

## Sales Order Verification

**Properties** [?] [X]

List | Detail | Serial & Lot Numbers | Reporting | Scanner | Filters | Data | Users

☒ Enable Update Reporting    ☒ Show Serial & Lot Numbers on Updates

Report Updates  
Report Updates By: ☒ Do ToDo Message if Missing Data

Creating Invoices In QuickBooks  
Printing Them  
**Sending a ToDo Item to QuickBooks**  
Creating Invoices In QuickBooks

Prefixes  
Serial: Serial:  
Lot: Lot:  
None: None:

☐ Automatically Print a Packing Slip When Done Scanning  
☐ Automatically Save a Copy of the Packing Slip When Printing It  
☒ Print Non-Scannable Line on Reports  
☒ Print Every Other Detail Line on Printed Reports With a Grey Background

Clear All    Save

**Reminders**

Due Date	Description
	<b>Business Service Messages</b>
	Online Banking transactions ready to send.
	<b>To Do Notes</b>
08/21/2008	Create Invoices For the Following Items...Scanned By:

Custom View    Collapse All    Expand All    Set Preferences...

When "Done" is clicked a you may select from three reporting options: **Print Them**, **Send a ToDo Item to QuickBooks** or **Create Invoices**

**Create Sales Orders** [?] [X]

Previous    Next    [?]    Spelling    History    Journal    Create Invoice    [X]

Customer: Job    Template: Print Preview  
Printing Company: Store #10    Demo Sales Order

Date: 05/05/2008    S.O. No.: 1044  
Ship To: Store #10  
Demo Lighting Company  
Store #10  
1010 Elvis St  
Famousville, CA 90123

**Sales Order**

Name / Address  
Demo Lighting Company  
1234 First Street  
Famousville, CA 90123

Ordered	Item	Description	Barcode	Rate	Amount	Invoiced	Clsd
10	Bulbs:H41930SP	Halogen, 20 watts	086600230108	1.20	12.00	10	✓
10	Bulbs:HY20CL/MC	Cand. Light, 20 watts (8 pack)	041163511309	28.00	280.00	10	✓
10	Bulbs:M5D200	100 watt (6 pack)	041196891027	11.00	110.00	10	✓

Customer Message: [v]

Total: 402.00

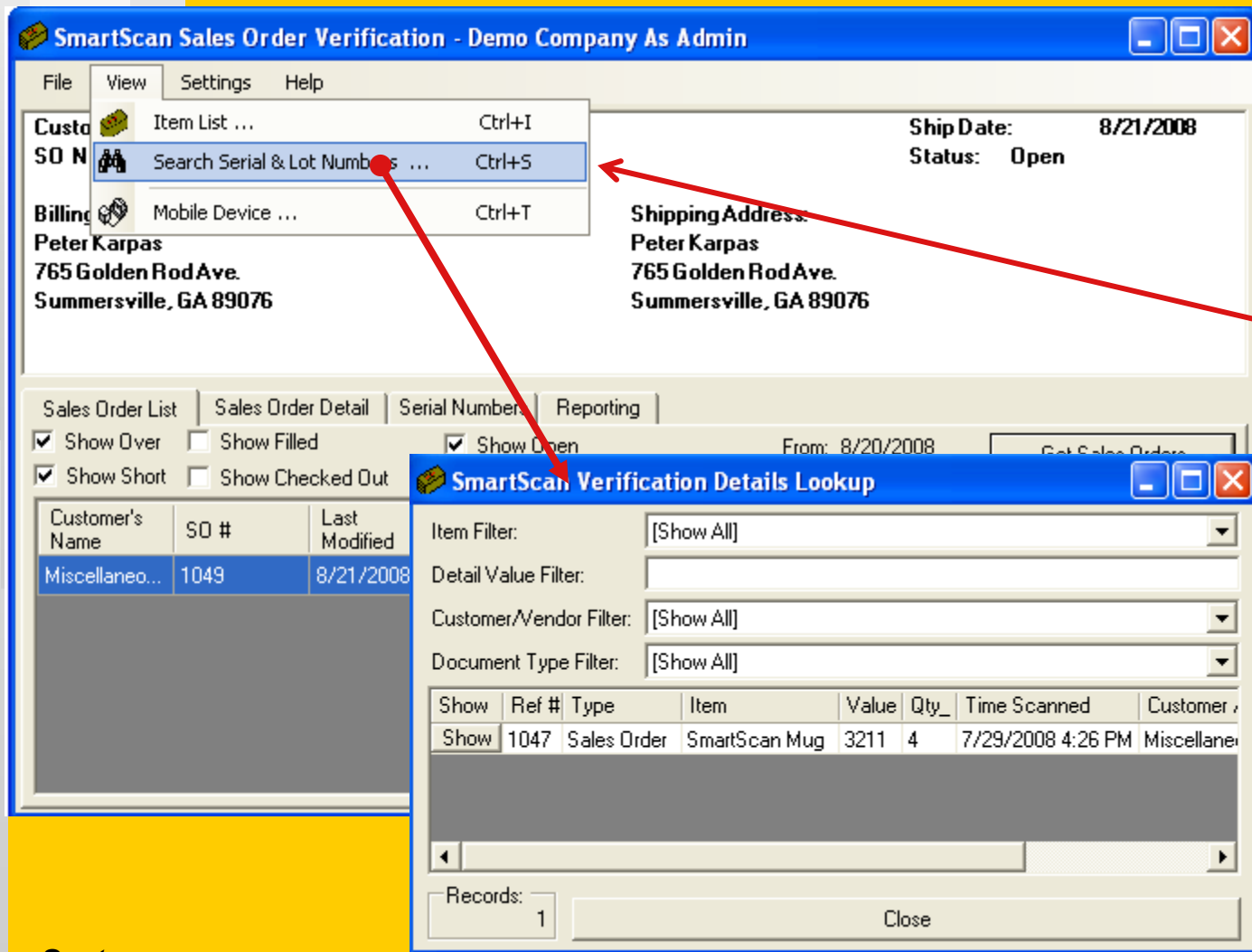
☐ To be printed    ☐ To be e-mailed    ☐ Closed

Memo: [ ]

Save & Close    Save & New    Revert

# SmartScan

## Sales Order Verification

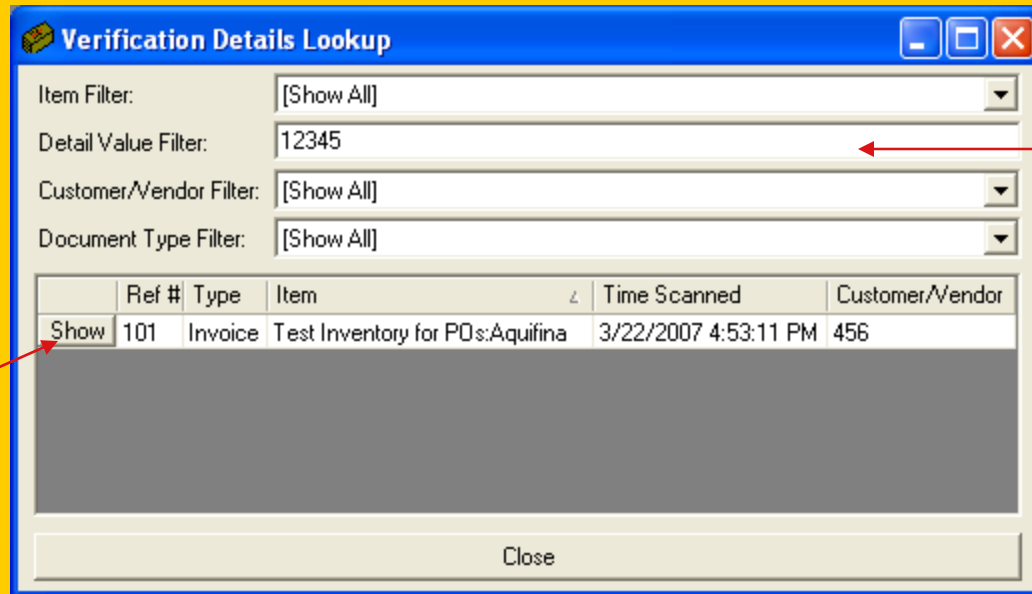


*To view serial numbers, Search the Verification Details Lookup Database.*

# SmartScan

## Sales Order Verification

*If QuickBooks is open, click “Show” to see the corresponding transaction in QuickBooks.*



The image shows a software window titled "Verification Details Lookup". It contains four filter fields: "Item Filter:" with a dropdown menu showing "[Show All]"; "Detail Value Filter:" with a text input field containing "12345"; "Customer/Vendor Filter:" with a dropdown menu showing "[Show All]"; and "Document Type Filter:" with a dropdown menu showing "[Show All]". Below these filters is a table with the following columns: "Ref #", "Type", "Item", "Time Scanned", and "Customer/Vendor". The first row of the table is highlighted and contains the values: "101", "Invoice", "Test Inventory for POs:Aquifina", "3/22/2007 4:53:11 PM", and "456". A red arrow points from the text on the left to the "Show" button in the first row of the table. Another red arrow points from the text on the right to the "Detail Value Filter" input field. At the bottom of the window is a "Close" button.

Ref #	Type	Item	Time Scanned	Customer/Vendor
101	Invoice	Test Inventory for POs:Aquifina	3/22/2007 4:53:11 PM	456

*Scan or type in the serial number to search.*

*This Verification Details Lookup searchable database logs and combines all serial numbers from Purchase Order Verification, Invoice and Sales Order Verification so you can track incoming and outgoing serial numbers, where they came from and who they went to. It's helpful for returns, warranty issues and recalls.*

# SmartScan

*By Baus Systems*



***John Palios***

***SmartScan Sales***

**John.palios@baus-systems.com**

**(206) 932-9986**



***[www.baus-Systems.com/smartscan.html](http://www.baus-Systems.com/smartscan.html)***