

iSUITE Updates

As of November 12, 2021

JOB MODULE PAGE

A change has been made to the display of the Jobs search page so that you don't have to click into a job to see basic information. You will now see a drop down from the PO detail view that will allow you to also see the line items associated with the job. This will also bring uniformity to information you see within the job details.

The screenshot displays the iSUITE Jobs search interface. At the top, there are filter sections: 'QUICK SEARCH' with a text input, 'STATUS' with a dropdown set to 'Order In Process', 'ORDER DATES' with a dropdown set to 'Any', and 'REQ SHIP DATE' with a dropdown set to 'Any'. Below these are 'SALES REP' (All Sales Rep), 'CUSTOMER' (All Customer), 'MASTER CUSTOMER' (All Customer), and 'VENDOR' (All Vendors), each with a dropdown. A 'Clear Filters' button and a search icon are on the right.

The main table lists jobs with columns: JOB, SAMPLE/RUSH, ORDERED, REP, CUSTOMER, MASTER CUSTOMER, JOB NAME, STATUS, REQ SHIP, IN HAND, and TRACKING. Three jobs are visible, with the third job (1917457AAA) selected and expanded.

The expanded view for job 1917457AAA shows a 'PO' section with columns: PO, VENDOR, CREATED, SENT, TOTAL, STATUS, SHIPPED, and CARRIER. It lists PO 001 for 'Alphabroder C...' created on 10/12/21 with a total of 3.84 and a 'PO CREATED' status.

Below the PO section is a table of line items with columns: PRODUCT, DESCRIPTION, COLOR, SIZE, QTY, COST, TOTAL, and STATUS. Two items are listed: 10260692 (BROD_G500_007 - ...) and 10260693 (BROD_G500_013 - ...), both with a 'PO CREATED' status.

Red arrows highlight the dropdown arrow on the right side of the PO section and the dropdown arrow on the right side of the line items table.

CREATE NEW JOB SCREEN

There has been a change to how the information is entered. You will first enter your Job Details, such as Job Title and Customer PO, and indicate if it will be a **RUSH** and **SAMPLE**. The language has also been updated to the **RUSH** and **SAMPLE** options, to make it clearer on what you are choosing, along with some blue information icons which will display detailed information when you hover over them.

In an effort to streamline the **Customer Details** step, we have reduced the number of options to two.

CREATE NEW JOB



JOB DETAILS

JOB NAME

CUSTOMER PO

SALES REP

Will display once customer is selected

WILL THIS BE A RUSH JOB? ⓘ

WILL THIS BE A SAMPLE JOB? ⓘ

☐ YES ☐ NO

☐ YES ☐ NO

CUSTOMER DETAILS

☒ SEARCH EXISTING CUSTOMERS

☐ ADD NEW CUSTOMER

Next

When using **SEARCH EXISTING CUSTOMERS**, you will be able to search your customer database as normal.

ADD NEW CUSTOMER is the same process. Please know there are some future changes coming that will help further streamline this process! When you return to the New Job tab, it will have the search field displayed where you can enter your newly created customer.

CUSTOMER DETAILS

Seaching for a shipping customer to pre-fill all the fields with the customer defaults.

AAA – AAA Specialty Wholesale, Inc|

SHIPPING CUSTOMER*

BILLING CUSTOMER*

ALTERNATE SHIPPING ADDRESS

+ Add Alternate Shipping Address

AAA SPECIALTY WHOLESALE, INC.

6759 H Abercrombie Road

Murrayville, GA 30564

AAA

AAA SPECIALTY WHOLESALE, INC

6759 H Abercrombie Road

Murrayville, GA 30564

AAA

CONTACT DETAILS

ORDERING CONTACT*

SHIPPING CONTACT*

INVOICING CONTACT*

AR CONTACT*

David Stolper

David Stolper

Jerry Abercrombie

Jerry Abercrombie

CANCEL OR DISCARD

NEXT

The **+Add Alternate Shipping Address** option has been made larger and moved higher on the page to be more visible.

Once you have filled in all information, click **Next**, and you will be brought to the Job screen.

JOB DETAIL SCREEN

If you would like to use the Product Research Tool (SAGE/ESP), the **ADD PRODUCT** button is located at the top of the page. If you would like a more customized approach to your order entry, you can still use the **ADD CHARGE** button within the Line-Item section.

SHIPPING DETAILS and **BILLING DETAILS** have been separated. **BILLING DETAILS** are minimized since they are typically not generated until the job has been completed. However, if you would like to see the info, you can click on the drop down.

The screenshot displays the Job Detail Screen for Job 1929872AAA. At the top, there's a header with a back link, job ID, customer name, and dates. Below this is a section with buttons for 'NEW', '11/11/21', and 'YOUR CUSTOMERS PO'. A row of action buttons includes 'REPEAT JOB', 'ADD PRODUCT' (highlighted with a red box), 'EDIT JOB', 'PRE-BILL DRAFT', and 'REJECTION REQUEST'. A 'FINANCIAL SNAPSHOT' table shows zero values for price, cost, revenue, and profit. The 'SHIPPING DETAILS' section shows customer and shipping contact information. The 'PURCHASE ORDER DETAILS' section includes a message about not creating a PO and a 'CREATE PO' button. A red arrow points to the 'BILLING DETAILS' dropdown at the bottom.

Job 1929872AAA		Demo Customer	CREATED	ORDERED	PO NUMBER	RUSH	SAMPLE
NEW			11/11/21	-	YOUR CUSTOMERS PO	-	-

JOB NAME/JOB TITLE
REPEAT JOB **ADD PRODUCT** **EDIT JOB** **PRE-BILL DRAFT** **REJECTION REQUEST**

FINANCIAL SNAPSHOT

CUSTOMER PRICE	YOUR COST	EST REVENUE	PROFIT
\$0.00	\$0.00	\$0.00	**.*%*

SHIPPING DETAILS

Demo Customer
ORDERING
Eric Porter
SHIPPING
Eric Porter

123 Main St
Wayland, MA, 01778
SHIPPING CUSTOMER
AAADEMO

PURCHASE ORDER DETAILS

We noticed you haven't created a Purchase Order for this Job yet

CREATE PO

BILLING DETAILS

PURCHASE ORDER DETAILS

Once you have added in your line items and decorations, click on **CREATE PO**. If no Purchase Order has been created yet. You will see a message underneath the Purchase Order Details Section that states “We noticed you haven’t created a Purchase Order for this Job yet”. If you exit out of an order before creating a PO, this will be a helpful reminder until you create a PO. The message will go away once the first PO is created.

CREATE PO

Hub Pen

Hit Promotional Products

NOTES

DELETE

Customer Cost									Vendor Cost					
<input type="checkbox"/>	DESCRIPTION	COLOR	SIZE	VENDOR	PO	QTY	BILLED	PRICE	QTY	BILLED	COST	STATUS	DECOR	F/U
<input type="checkbox"/>	Javalina (TM) Executive Pen Black	Black		Hub Pen		1	0	0.64EA	1	0	0.24EA	PO NOT CREATED	1	...
<input type="checkbox"/>	Screen printed 1 1/2" W x 3/4" H o...			Hub Pen		1	0	0.00EA	1	0	0.00EA	PO NOT CREATED	1	...
<input type="checkbox"/>	Send E-Proof to esporter@ipromot.com			Hub Pen		1	0	0.00EA	1	0	0.00EA	PO NOT CREATED	1	...

Once you have created your PO(s), you can now perform PO specific actions. Common actions have been placed on the main screen and are now blue Action buttons. You can also click the drop down on the right to see the line items associated with the PO.

SHIPMENT

PO	VENDOR	CREATED	SENT	TOTAL	STATUS	SHIPPED	CARRIER
<input checked="" type="checkbox"/> 1929872AAA-001	Hub Pen ★	11/10/21		0.24	PO CREATED		
PRODUCT	DESCRIPTION	COLOR	SIZE	QTY	COST	TOTAL	STATUS
10357500	Javalina (TM) Execu...	Black		1	\$0.24EA	\$0.24	PO CREATED
10357541	Screen printed 1 1/2...			1	\$0.00EA	\$0.00	PO CREATED
10357542	Send E-Proof to epo...			1	\$0.00EA	\$0.00	PO CREATED
<input type="checkbox"/> 1929872AAA-002	Hit Promotional Pr... ★	11/10/21		0.58	PO CREATED		

As Shipments (Tracking) are added, they will display on the main page. You will no longer have to click into a Tab to see them.

Please see your shipment details below

[illegible]

There is now an editor located within the text field on the **Send PO** screen where you can change font colors, format text (bold, italicize) and even add links or images. Please note, if you press the **Discard** button you will need to make the changes again.

1. VENDOR DETAILS
2. SHIPPING DETAILS
3. CONFIRM & SEND
4. SEND PO

TO orders@hitpromo.net

FROM jdstolp@gmail.com

CC jdstolp@gmail.com

BCC

[+ Change Emails](#)

ATTACHMENTS: [+Add Attachments](#)

SUBJECT

PO Number - 1929872AAA-002 AAA Specialty Wholesale, Inc.

BODY

B I U [List Icon] [Link Icon] [Text Color Icon] [Background Color Icon] [Text Color Icon] [Background Color Icon]

[Image Icon] [Table Icon]

[Link Icon] [List Icon] [Undo Icon] [Redo Icon] [Print Icon] [Link Icon] [Help Icon]

Please find attached our purchase order number 1929872AAA-002.

If there are any questions please call 770-534-8114 or email ddstolper@ipromoteu.com.

Thank you.

Order Number: 1929872AAA-002

Email: ddstolper@ipromoteu.com

Orders and Pre-Production Samples should be shipped to this address, unless otherwise noted.

SHIP BLIND TO THIS ADDRESS

Demo Customer
PO#: YOUR CUSTOMERS PO
Eric Porter
123 Main St
Wayland MA 01778

Ship Via: **UPS Ground**

Ship Date:	In-Hands Date:
11/11/21	11/18/21

BILLING ADDRESS ONLY
321 Commonwealth Rd. #101
Wayland, MA 01778

DO NOT SHIP HERE!

Shipping Account info has been moved to the Shipping section of this PO.

PLACE THIS ORDER ONLY ON ACCOUNT NUMBER:
150837

Quantity	UoM	Item	Style Code	Description	Unit Cost	Extension
1	EA	321		Erasable Highlighter White/blue	0.58	0.58