



## PROTEUS MMX – STOCK ORDER LIST

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Revision 6/20/2018

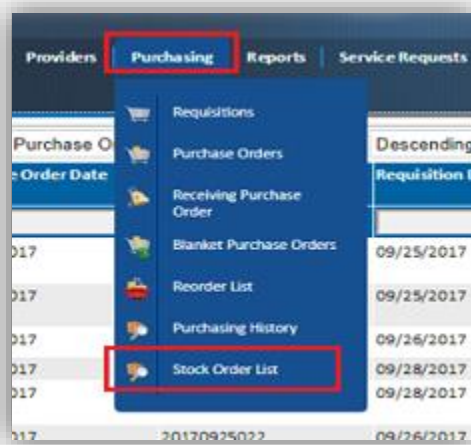
# STOCK ORDER LIST

## FEATURE OVERVIEW

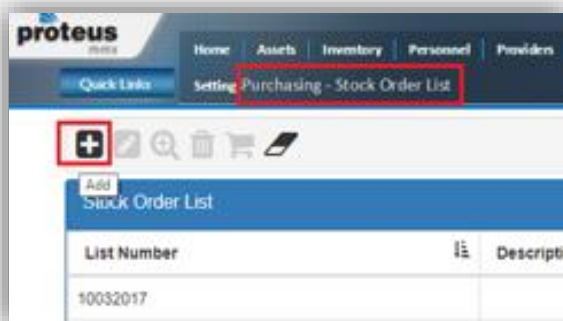
### HOW TO ACCESS & CREATE A NEW STOCK ORDER LIST:

1. Go to *Purchasing* and select **Stock Order List**.

#### Purchasing >> Stock Order List



2. Click on **Add** to create a stock order list.



3. From the below image, select multiple parts of different vendors.
  - Select **two (2)** parts.
  - Select a stockroom from the drop-down.
  - *Vendor* and *Vendor Last Cost* will be shown based upon stockroom.
  - Select **Quantity Ordered**, it is a mandatory field.
  - After filling in every detail, click the **Next** button.

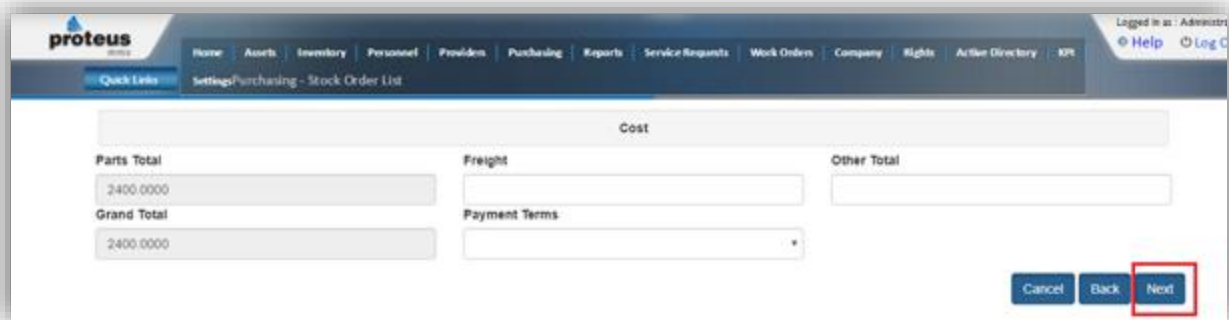
<input type="checkbox"/>	Up-Part-1009	Part-1009			
<input type="checkbox"/>	UP-102	Gear Part			
<input type="checkbox"/>	UP-101	Spare Part			
<input checked="" type="checkbox"/>	UP-01	Spare-UP-01	UP-02-Stockroom-Facility	1001-vendor(Tamil)	200.00
<input checked="" type="checkbox"/>	stock-part -02(up)	part-mouse -02	UP-01-Stockroom-Building A	1004-Vendor(Tamil)	0.00
<input type="checkbox"/>	stock-part -01(up)	mouse tamil-01			
<input type="checkbox"/>	PN-0123	Test Part (PN-0123)			
<input type="checkbox"/>	part vendors	vendors parts-bottle			

4. At the next screen, enter the **Stock Order Number** and click again, on **Next**.

Quick Entry    Settings/Purchasing - Stock Order List

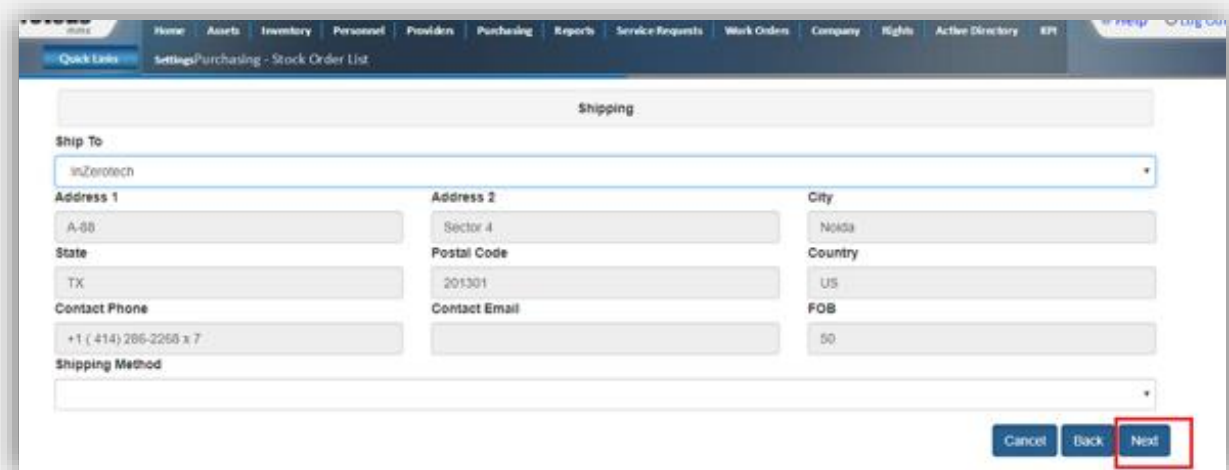
<b>StockOrderNumber</b> <input type="text" value="Stock order number-01"/>	<b>StockOrderDate</b> <input type="text" value="10/03/2017"/>	<b>PromiseDate</b> <input type="text" value="10/10/2017"/>
<b>Stock Center</b> <input type="text"/>	<b>Account</b> <input type="text"/>	<b>Buyer</b> <input type="text"/>
<b>Requester</b> <input type="text"/>	<b>GrandTotal</b> <input type="text" value="2400.0000"/>	<b>Description</b> <input type="text"/>
<b>UserField1</b> <input type="text"/>	<b>UserField2</b> <input type="text"/>	<b>UserField3</b> <input type="text"/>
<b>UserField4</b> <input type="text"/>	<b>UserField5</b> <input type="text"/>	<b>UserField6</b> <input type="text"/>
<b>UserField7</b> <input type="text"/>	<b>UserField8</b> <input type="text"/>	<b>UserField9</b> <input type="text"/>
<b>UserField10</b> <input type="text"/>	<b>UserField11</b> <input type="text"/>	<b>UserField12</b> <input type="text"/>
<b>UserField13</b> <input type="text"/>	<b>UserField14</b> <input type="text"/>	<b>UserField15</b> <input type="text"/>

5. Review the details on the **Cost** screen. Click **Next**.



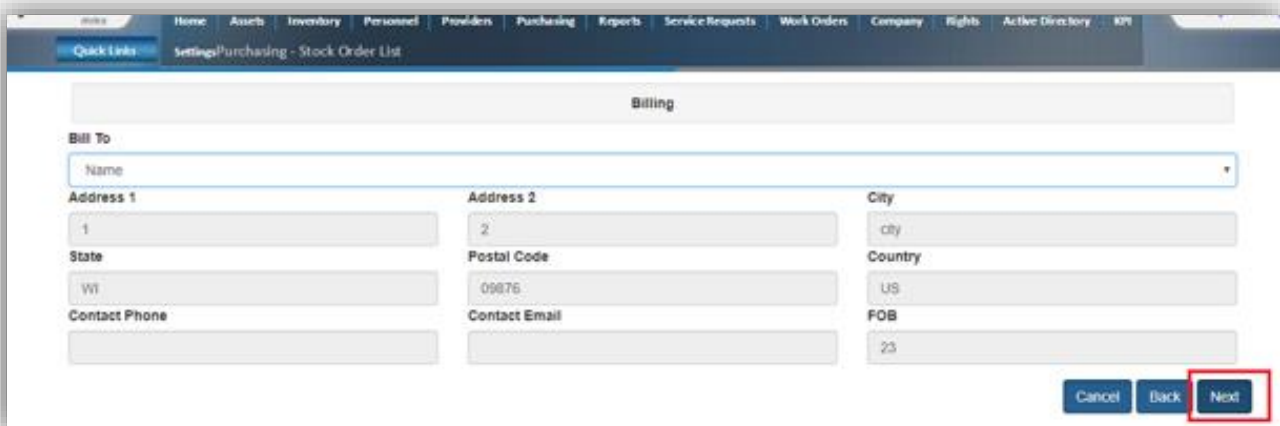
The screenshot shows the 'Cost' screen in the Proteus software. The header includes the Proteus logo and a navigation menu with options like Home, Assets, Inventory, Personnel, Providers, Purchasing, Reports, Service Requests, Work Orders, Company, Rights, and Active Directory. A 'Quick Links' section is also present. The main content area is titled 'Cost' and contains several input fields: 'Parts Total' (2400.0000), 'Grand Total' (2400.0000), 'Freight', 'Payment Terms', and 'Other Total'. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a red rectangle.

6. Review the details on the **Shipping** screen. Select a shipping address. Click **Next**.



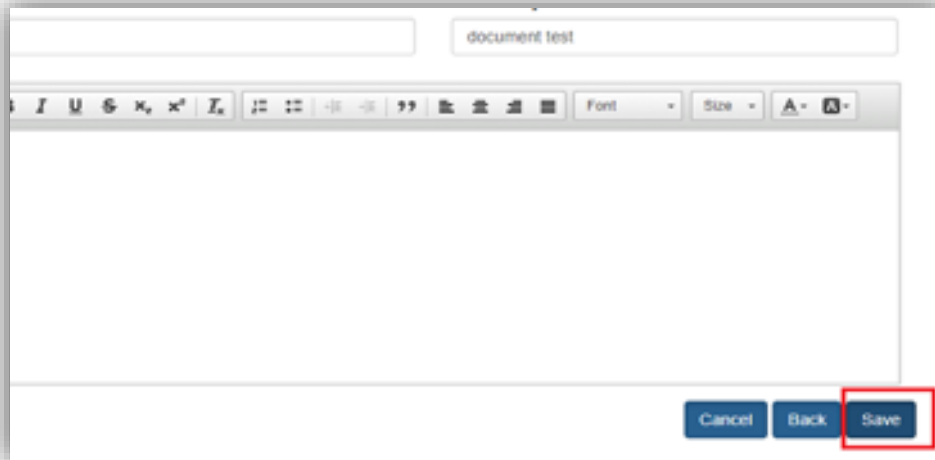
The screenshot shows the 'Shipping' screen in the Proteus software. The header and navigation menu are the same as in the previous screenshot. The main content area is titled 'Shipping' and contains a 'Ship To' dropdown menu. Below this, there are several input fields for shipping details: 'Address 1' (A-88), 'Address 2' (Sector 4), 'City' (Noida), 'State' (TX), 'Postal Code' (201301), 'Country' (US), 'Contact Phone' (+1 (414) 286-2268 x 7), 'Contact Email', 'FOB' (50), and 'Shipping Method'. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a red rectangle.

7. Review the details on the **Billing** screen. Select a billing address. Click **Next**.



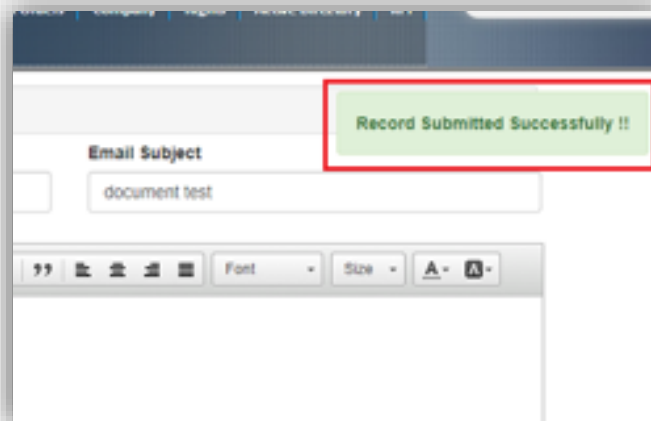
The screenshot shows the 'Billing' screen in the Proteus software. The header and navigation menu are the same as in the previous screenshots. The main content area is titled 'Billing' and contains a 'Bill To' dropdown menu. Below this, there are several input fields for billing details: 'Address 1' (1), 'Address 2' (2), 'City' (city), 'State' (WI), 'Postal Code' (09876), 'Country' (US), 'Contact Phone', 'Contact Email', and 'FOB' (23). At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a red rectangle.

8. If necessary, fill out all information fields on the **Email** screen. Once completed, click **Save**.



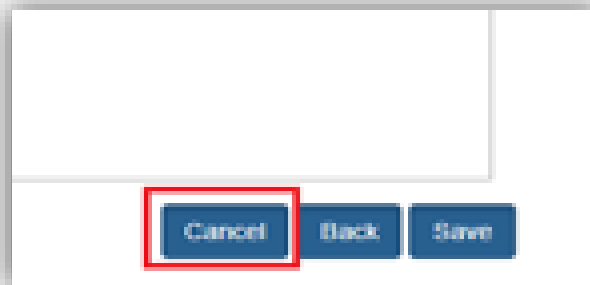
A screenshot of a web application interface for sending an email. At the top, there is a text input field containing "document test". Below this is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, and text color. The main area of the rich text editor is empty. At the bottom right of the interface, there are three buttons: "Cancel", "Back", and "Save". The "Save" button is highlighted with a red rectangular box.

9. When the record is saved, a message will pop up, notifying the user of a successful record submission.

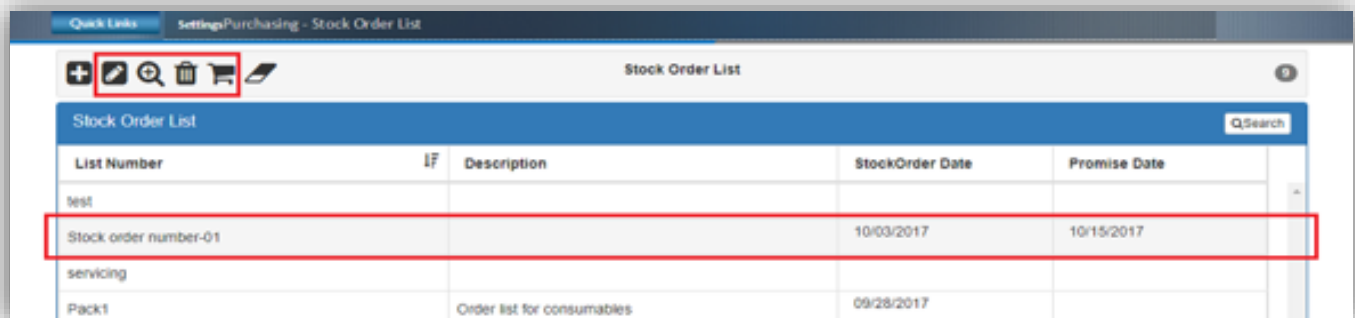


A screenshot of the same web application interface as in the previous image, but now showing a success message. A green rectangular box with a red border is overlaid on the top right of the interface, containing the text "Record Submitted Successfully !!". Below this message, the "Email Subject" label is visible, followed by a text input field containing "document test". The rich text editor toolbar is also visible below the input field.

10. After the record has been saved, click **Cancel** to go back to the **Stock Order List** page.



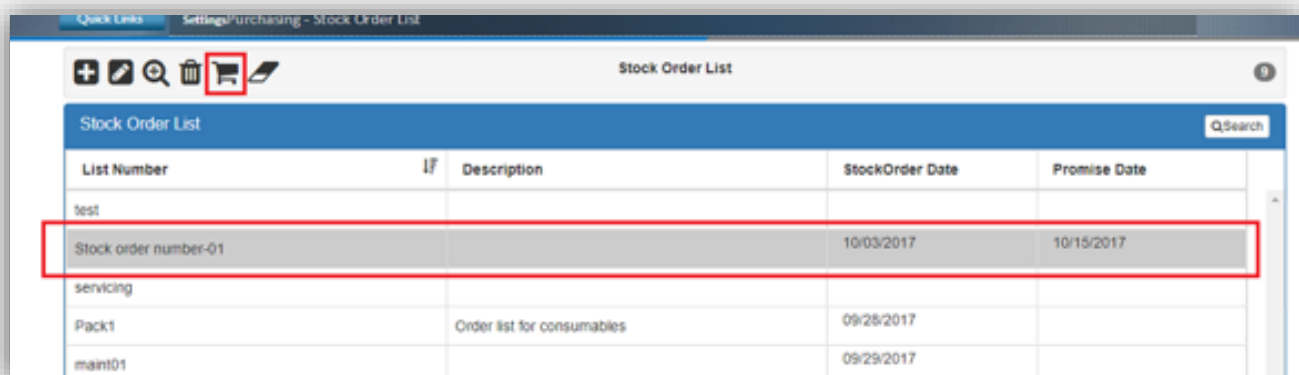
11. From the **Stock Order List** page, select a created stock order then the actions (**Edit**, **View**, **Delete**, and **Assign Purchase Order Number**) will be enabled.



List Number	IF	Description	StockOrder Date	Promise Date
test				
Stock order number-01			10/03/2017	10/15/2017
servicing				
Pack1		Order list for consumables	09/28/2017	

**NOTE:** **Add** and **Clear** are already enabled. The **Clear** icon is used to clear the search bar.

12. Select the created stock order from the list and click on the **Assign Purchase Order Number** icon



List Number	IF	Description	StockOrder Date	Promise Date
test				
Stock order number-01			10/03/2017	10/15/2017
servicing				
Pack1		Order list for consumables	09/28/2017	
maint01			09/29/2017	

13. Assign a purchase order number and select **Save**.

**Assign Purchase Order Number**

Purchase Order Number

Stock order number-01/ purchase order number- Oct 10,2017

SAVE

Order list for consumables 09/29/2017

14. When a purchase order number is assigned, all vendors, whose parts are used in the stock order will get an email for every selected part and those who are entered in the **Email To** and **Email CC** fields will get an email as well.

#### EMAIL EXAMPLES (PART 1 & PART 2):

Stock Order Details:						
Purchase Order Date	10/03/2017					
Purchase Order Number	SO-Stock order number-01/ purchase order number- Oct 10,2017-834020928					
Requester Name						

Vendor Information:	
Vendor Name	vendor-tamil
Address 1	sec-3
Address 2	Address 21
CityStatePostal Code	City1 66215 110096
Contact Name	nazish
Contact Phone	+13 (3) 12- x2
Contact Email	<a href="mailto:nazisha@inzerotech.com">nazisha@inzerotech.com</a>

Stockroom Parts:							
#	Part Number	Description	Quantity	Unit Cost	Tax Rate (%)	VAT Rate (%)	Total Cost
1	UP-01	Description	12	200.00			2400.00
<b>Parts Total</b>							<b>2400.00</b>

Stock Order Details:						
Purchase Order Date	10/03/2017					
Purchase Order Number	SO-Stock order number-01/ purchase order number- Oct 10,2017-844020958					
Requester Name						

Vendor Information:	
Vendor Name	vendor(tamil)
Address 1	sec-4
Address 2	34
CityStatePostal Code	
Contact Name	nazish
Contact Phone	
Contact Email	

Stockroom Parts:							
#	Part Number	Description	Quantity	Unit Cost	Tax Rate (%)	VAT Rate (%)	Total Cost
1	stock-part -02(up)	2	121	0.00			0.00
<b>Parts Total</b>							<b>0.00</b>