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## **Welcome to BSC Food Distribution**

In this tutorial we will cover the following...

- Configuring the database connection.
- Logging in to the program.
- Creating a Sales Quote.
- Creating a Sales Order.

## Login Screen

- Once you start the program you will be prompted with a login screen.
- First you should set up your connection by going to the connection tab.



## Connection Configuration

- In the case of the demo the settings should be the same as shown here.



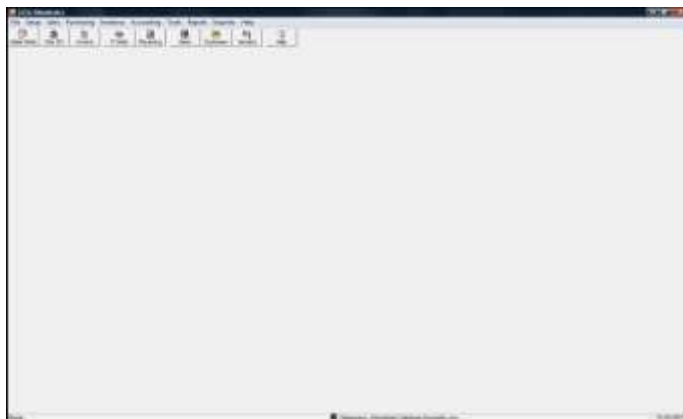
## Login

- After configuration go back to the login tab.
- Enter your user name (usually Administrator) and your password (usually admin) and press the login button.



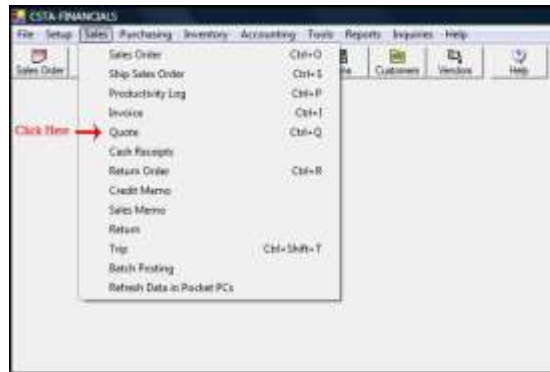
## Main Window

- After logging in you will be greeted with the main window. You can access all the software's features from the main menu and the more commonly used features are available as shortcuts below the menu.



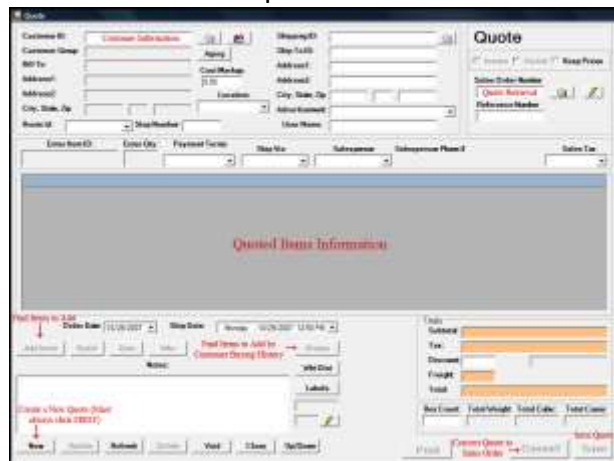
## Sales Menu

- Now we will begin a new sales quote.
- To do so click on the sales menu and click on “Quote”.



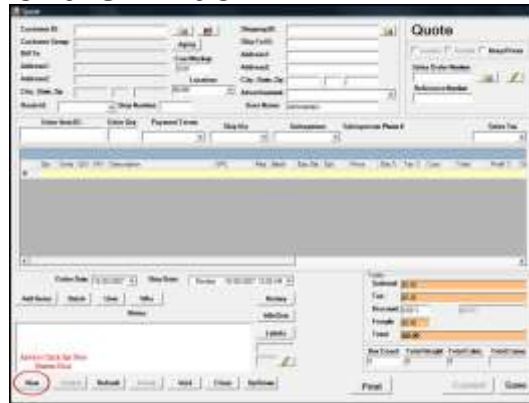
## Sales Quote

- You should now see a window like the image below.
- Please take note of the important areas marked on the image.



## New Sales Quote

- To start a new Sales Quote you must always click the “New” button on the bottom left corner of the window.



## Customer Search

- Now we should designate what customer the quote is for.
- You can do this two ways:
  - Fill in the “Customer ID” and press enter.
  - Search for the customer by various information (shown below).





## Adding Items

- You may now close the customer search screen. The customer's information should now be displayed.
- Next we will add items to the Sales Quote. There are three ways this can be done:
  - Add items manually by the item number.
  - Use the search function to find items to add.
  - Add items by the customer's buying history.

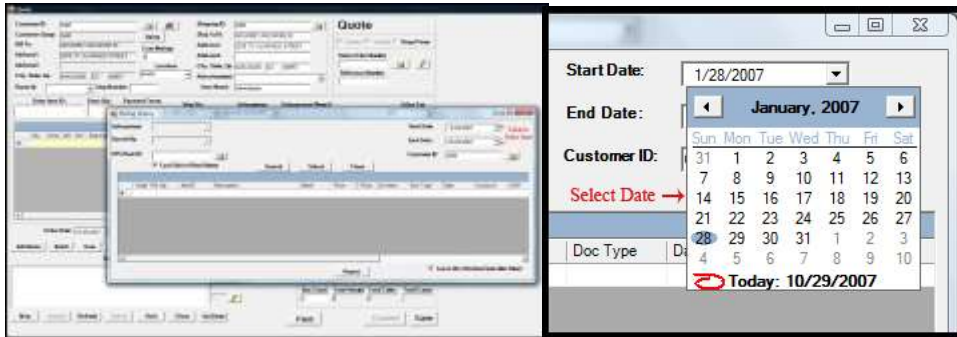
## Add Items By History

- Lets try adding items by the customer's buying history. This is a quick way to add items that the customer usually buys. Note: this function is also available in Sales Orders and Purchasing Orders.
- Click the "History" button to begin adding items by the customers buying history.



## Add Items By History

- You should now see the Pricing History window.
- First we need to select the dates we want to see of that customer's buying history.
- To do this select the Start Date and the End Date you want.



## Add Items By History

- Now that we have the appropriate start and end date selected we can click the "Search" button.
- The results of the search should be all the items that customer has bought between those dates and the pricing they received for those items.





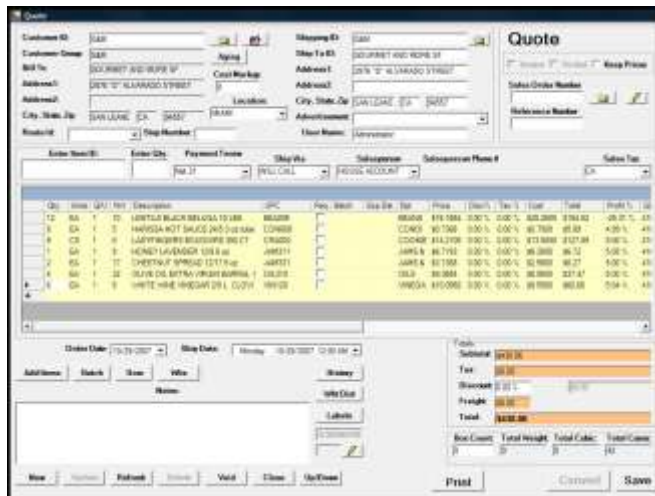
## Add Items By History

- Next, select the items in the list that the customer is interested in. If they are requesting items they don't usually buy, those can be entered via manual entry or an item search.
- Click the checkbox of the item you wish to include and also type in the desired quantity of that item. Then click "Select".



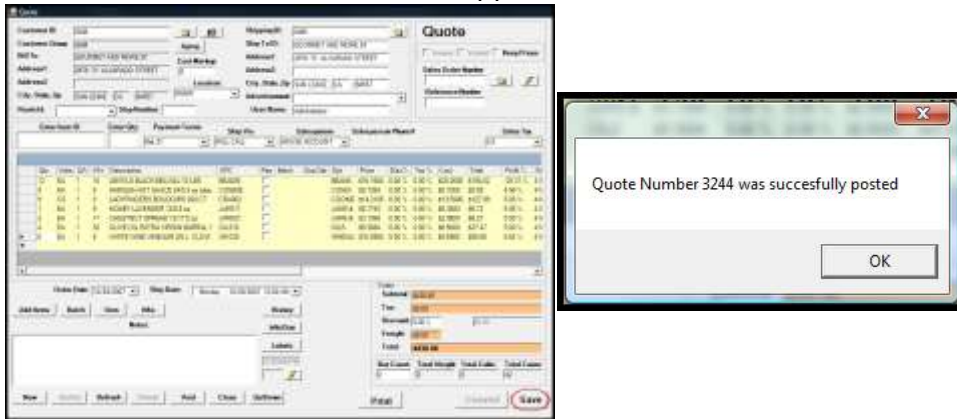
## Item List

- We now have a list of items in our Sales Quote.



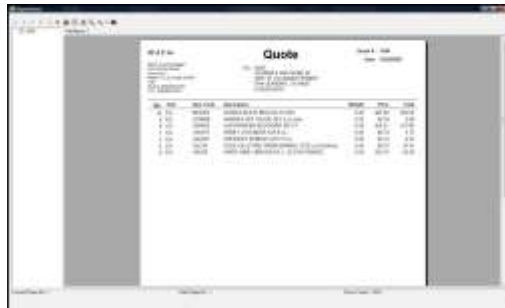
## Save Sales Quote

- Now is a good time to save our Sales Quote.
- Click the “Save” button on the bottom right corner.
- A confirmation window will appear, click “OK”.



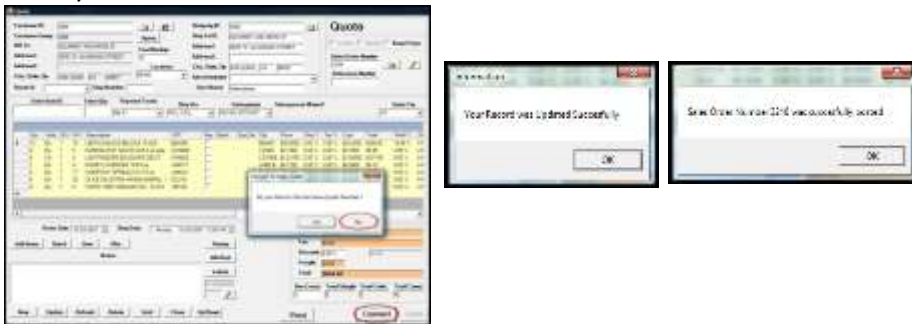
## Print Sales Quote

- Now we can print our Sales Quote.
- Note:
  - All invoices and forms are customized specifically for each client using our software.
  - The created invoice can be exported to a number of different formats (pdf, excel, word), giving you the option to also email your invoices.



## Convert to Sales Order

- Now lets say the customer wants to make an order based on the quote you've sent them.
- Instead of starting a blank Sales Order, you can convert your Sales Quote into a Sales Order.
- To do so click the "Convert" button and click "No" when asked if you'd like to use the same Quote Number.

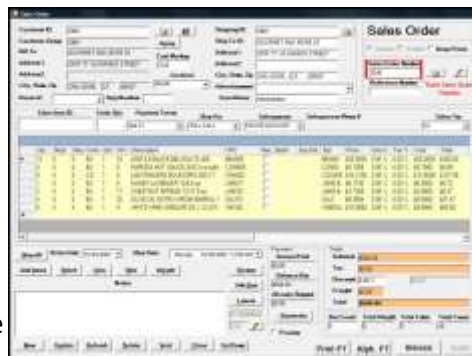


## Open the Sales Order

- Now we can close our Sales Quote and open the Sales Order window.
- Remember the Sales Order Number which was created during conversion.



- We can now enter that number into the "Sales Order Number" entry field and press enter. This will load our Sales Order into the window.



## Add Items

- Now that we have our Sales Order loaded, lets say that the customer also wanted to add some items that weren't on the Sales Quote.
- To do this we will search for the item we want to add by clicking the "Add Items" button.



## Add Items

- Lets say the customer wants to add some domestic cheese items to the order.
- We can search for domestic cheese items by selecting the "CHEESE-DOMESTIC" category. Then we click the "Search" button.
- Note: Categories are user created groups of items. You can assign specific items to belong to categories that you define.



## Ship All

- Now that our order has all the items the customer requested we can click the “Ship All” button to signal that all the items are ready to be shipped.
- Next we need to check if any of the items in our order are catch-weight.
- Catch-weight items are items which are priced based on their weight, but that weight varies.
- For these items we need to enter the weights of the selected items to properly price them.

## Catch Weight

- First, to see if an item is catch-weight we need to scroll to the right in the item list. Look for the “Catch Weight” column. Any items that are checked in this column are catch-weight items and need to have their weights entered.
- Select the item you wish to enter a weight distribution for and click the “Weight” button.



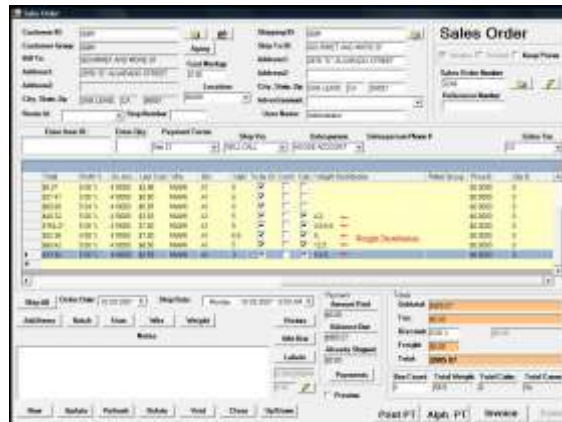
# Catch Weight

- Now you should see the Weight Distribution window.
- Input the weight for each of the items in the weight box and press enter.
- The number of weights you must enter is specified by the quantity of that item.
- Click the "Save" button and repeat this process for each catch weight item.



# Catch Weight

- After entering all the weights for your catch-weight items you should see the weight distributions you entered in the item list.



## Post Invoice

- Our Sales Order is now complete and we are ready to ship the items.
- Now we will print our invoice to send over to the warehouse.
- We can choose to pose the invoice now or later. It's usually a good idea to post the invoice later, so that changes to the order can be made if needed.



Note: We can do a batch posting of orders at the end of the day after all the orders are shipped and confirmed.

## Printed Invoice

- Here is our printed invoice.
- Note: All invoices and forms are customized specifically for each client using our software.





This concludes the Connection, Sales Quote, and Sales Order tutorial of BSC Food Distribution. Thank you for using our software and expect to see more tutorials coming in the near future.

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