

NolaPro Menu Items

I. Orders

A. Customers

1. New Customer
2. Edit Customer
3. Customer List
4. View Account
5. Activity History
6. Balance History
7. B2B Users
8. Merge Customers

B. Fulfillment Orders

1. New Order
2. Edit Order
3. Dynamic Order Page
4. Check In/Out
5. Ship Order
6. Fill Start/Stop
7. Process Status
8. Orders → Invoices
9. View Shipped Orders
10. Process RMAs
11. RMA Setup

C. Service Orders

1. New Order
2. Edit Order
3. Log New Time
4. Edit Internal Work
5. Over Estimate
6. Hours Ordered
7. Time Report

D. Reports

1. Orders Open
2. BackOrders
3. Items Backordered
4. Orders Received
5. Orders Completed
6. Voided Orders
7. Orders Unconfirmed
8. RMA Lists
9. Customer Item History
10. Item order History
11. Inventory History
12. Items Shipped
13. Open Items on Orders

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14. Open Order Weight View
15. Fulfillment Quotes
16. Shipped But Not Billed
17. Billed Not Paid
18. Performance Statistics
19. Volume Report

E. Lead Tracking

1. Sales Action Report
2. Sales Overview Report
3. Process Add/Update

F. Setup Service

1. Service Classes
2. Service Labor Rates
3. Service Status Options
4. Service Types

G. Setup Lead Tracking

1. Actions
2. Categories

II. Billing

A. Invoices

1. New Invoice
2. Edit Invoice
3. Calculate Interest
4. Enter Payments
5. Void Payments
6. Bad Debt
7. Refund Credit
8. Reprint Invoices
9. View/Print Statements

B. Payment Plans

1. New Plan
2. Edit Plans
3. Post Plans
4. List Plans

C. Processing

1. Misc. Sales
2. Calculate Interest
3. Import Distribution
4. New Bank Deposit
5. Edit Bank Deposit

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D. Reports

1. Aging Details
2. Aging Report
3. Credit Card Transactions
4. View Customer Account
5. Activity History
6. Balance History
7. Customers by Sales
8. Inactive Customers
9. Misc. Sales
10. Payment Report
11. Recent Customers
12. Profitability Report
13. Sales Tax Report
14. Summary of Invoices

E. Setup Receivables

1. Beginning Balances
2. Company Options
3. Credit Card Options
4. Customer Groups
5. Customer Page Customizer
6. Invoice Notes
7. Invoice Terms
8. Quote Comments
9. Sales Categories
10. Sales Personnel
11. Sales/Pricing Unit Name
12. Tax Exemptions
13. Sales Taxes
14. Carrier Methods
15. Standard GL Accounts

III. Inventory

A. Items

1. Add New Item
2. Edit Items
3. Item Transfers
4. Item Breakdown
5. Item Adjustments
6. Item Cost Adjustments
7. Item Vendors

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B. Manage Build Orders

1. Add
2. Edit
3. List
4. Create PO
5. Edit Definitions
6. List Definitions

C. Process

1. Physical Inventory
2. Item Reorder List

D. Reports

1. BOM List
2. Item Activity
3. Item Detail History
4. Item Distribution
5. Item Prices
6. Item Conversions
7. Item Status
8. Item Summaries
9. Item Usage History
10. Item Valuation
11. Item Vendor List
12. Item Vendor Prices
13. Notification Requests
14. Incomplete Items

E. Setup Inventory

1. Plant Locations
2. Item Beginning Balances
3. Item Categories
4. Item Option Groups
5. Item Page Customizer
6. Price Levels
7. Sales/Pricing Unit Name
8. Search Categories
9. Standard GL Accounts
10. Standard Markup

IV. Payables

A. Vendor Bills

1. New Bill
2. Edit Bills
3. Payables List

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B. Credit Card Purchases

1. CC Purchases
2. New Credit Card Bills
3. Edit Credit Card Bills
4. List of CC Purchases
5. Credit Cards
6. Charge Types
7. General

C. Checks

1. Manual Checks
2. Write Checks
3. List of Checks
4. View/Cancel Checks
5. Commission Checks

D. Purchasing

1. New Purchase Order
2. Edit PO
3. Completed PO to AP
4. Receive Items on PO
5. Receive Without PO
6. Items Received List
7. Purchase Order Lists
8. Item Vendors

E. Vendors

1. New Vendor
2. Edit Vendor
3. Vendor Lists/Labels
4. Vendor B2B Login Users

F. Reports

1. Aging - Detail
2. Aging - Discount
3. Aging - Summary
4. Cash Requirements
5. Lists of Checks

G. Setup - Payables

1. Beginning Balance Bills
2. Checking Accounts
3. PO Notes
4. Vendor Page Customizer
5. Standard GL Accounts
6. Shipping Setup
7. Vendor Terms
8. Vendor Types

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V. Payroll

A. Employees

1. New Employee
2. Edit Employee
3. Employee Deductions
4. Write Employee Review
5. Name/Address/Phone
6. Birthdays
7. General Info
8. Phone List
9. Seniority

B. Calculate and Checks

1. Log Hours
2. Calculate
3. Employee Pay/Ded
4. Write Checks
5. Check Summary

C. Periodic Reports

1. 941s
2. W2s

D. Reports

1. Check Summary
2. Pay History
3. Workman's Comp
4. Direct Deposits
5. Name/Address/Phone
6. Birthdays
7. General Info
8. Phone List
9. Pay By Week
10. Pay By Month
11. Pay By Quarter
12. Seniority

E. Setup - Payroll

1. Checking Accounts
2. Company Contributions
3. Deduction Groups
4. Direct Deposit Auth.
5. General Benefits (Pay)
6. General Deductions
7. General Factors
8. Pay Types
9. Pension Plans
10. Rating Scale for Reviews
11. Standard GL Accounts

NolaPro Menu Items

F. Tax Tables

1. Tax Table Add/Update
2. Tax Type Add
3. Tax Type Update
4. Start New Tax Year

G. Timeclock Setup

1. General
2. Other Time

H. Timeclock Reports

1. Time Summary
2. Current Status

I. Timeclock Processing

1. Approve Times

VI. Ledger

A. Chart of Accounts

1. New GL Accounts
2. Edit Chart of Accounts
3. Chart of Accounts List
4. Assign Summarization

B. Budgets

1. Budget Add/Update
2. Budget List
3. Budget Variance

C. Journal Entries

1. New Journal Entry
2. Edit Journal Entries
3. Post Journals Now
4. Reverse Postings
5. Journal Reports
6. Unbalanced

D. Recurring Ledger Entries

1. New Recurring Entries
2. Edit Recurring Entries
3. Post Recurring Entries

E. Bank Reconciliation

1. Bank Reconciliation

F. Reports

1. Account Activity
2. Balance Sheet
3. Standard Balance Sheet
4. Daily Report
5. Detailed Trial Balance
6. Chart of Accounts List

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7. Journal Reports
8. Pie Charts
9. Profit & Loss Statement
10. 12 Month P&L

G. Setup-Ledger

1. Account Types
2. Close Year
3. Import Accounts
4. GL Cost Centers
5. GL Summary Levels
6. Export Accounts
7. Set Fiscal Start Month

VII. Admin

A. My Info

1. My Info
2. Messages

B. Reports

1. NolaPro Activity
2. Database Explanation
3. Surveys

C. Imports

1. NolaPro Update
2. Import Customers
3. Import Employees
4. Import GL Totals
5. Import Inv Categories
6. Import Inventory Items
7. Import Vendors
8. Quickbooks

D. Admin Setup

1. Add-ons & Plug-ins
2. API Log Viewer
3. B2B Site Graphics
4. Branding
5. Company Add/Update
6. Custom Fields Editor
7. Database Information
8. Email Center
9. Home Page Caching
10. IP Access Manager
11. Language Editor
12. Link Add/Update
13. Message Categories
14. Message Graphics

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- 15. State Add/Update
- 16. Survey Manager
- 17. System Settings
- 18. User Add/Update

VIII. P.O.S.

A. Point of Sale

IX. B2B

A. Business to Business