

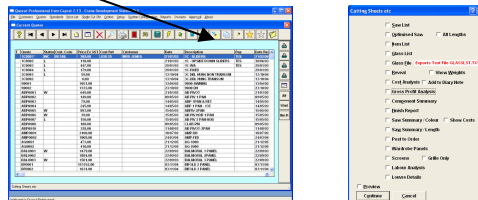
ORDERS

The program offers the ability to post a quotation to an order, which will then be available to be modified as required and printed as an order. This process will facilitate the ability to use optimization for ordering materials required but is not an ordering system for recording inventory.

1. TO POST A QUOTATION TO AN ORDER

To post a quotation to an order, proceed as follows:

- In the Quote Items screen highlight the relevant quotation and select the reports icon.



- Select <Post to Order> and then select Continue
- The order will now be posted to <To be Ordered> in the Orders menu

Note - Any order not processed will remain in the Current Items to be Ordered database until processed.

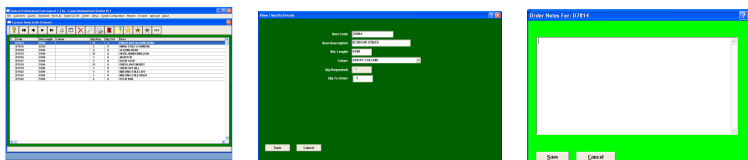
2. ORDERS

Within the Orders menu the following options are available:

- To be Ordered
- Orders
- Suppliers

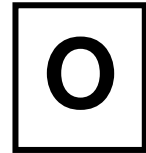
2.1 To be Ordered

Orders posted are held in the in the <To be Ordered> database



To update each line item, proceed as follows:

- Select Orders | To be Ordered menu
- Select the 'View/Modify' icon and modify as required – e.g. change the Quantity to order and **SAVE**
- Select the Item/Comment icon if required and add a comment for an individual line item and **SAVE**



ORDERS

Ordering

- Select the items to be ordered by using the tag icon/s
- Select the <Ord> icon to convert to an order
- Update the supplier details from the Supplier database
- Update the Raised By field from the database (Setup | Staff) and select OK
- The program will prompt with a query to generate the order – select YES
- If require add an instruction to the item and SAVE
- Enter an Order Number and select OK



2.2 Orders

When items 'to be ordered' have been converted to an order select Orders | Orders menu. When an order has been converted the details in regard to supplier and staff can be modified.

- Highlight the order and select the View/Modify icon
- Update as required and SAVE



- When the order is finalised, select the printer icon
- Choose whether to preview the order before printing

2.3 Suppliers

The supplier details can be modified – just select one of the codes and then select View/Modify and when completed, select SAVE

