Convert Information Sheet

Orders can be converted to Invoice or Packing slip and Packing slips can be converted to Invoice. This process can be done through "Clients | Convert | Order(s) to Packing slip / Order(s) to Invoice / Packing slip(s) to Invoice and "Clients | Client orders".

To Convert Order(s) to Packing slip

The "Convert Client Order to Packing Slip Screen" (*Fig 1.*) allows you to covert an existing client order into a packing slip. All or part of an order can be converted and the item quantity edited. Items from several orders can be combined onto one client packing slip. Go to "Clients | Convert | Order(s) to Packing slip".

Client Order Selection

Client Details Client code Softwart region Client code Softwart region Client code Client	Select the client. Select the order from 'Client orders' tab as in <i>(Fig1.)</i> .
UP DOVMN All suppliable items UP DOVMN All suppliable items	The 'Delivery address' will display the address that the order is to be delivered to. 'Note' will display any notes made when the order was placed. The 'Action' option for the conversion should display Packing Slip.

Fig 1. Convert Client Order to Packing Slip Screen

Note: Changing the 'Action' option will change the type of conversion. 'Packing Slip' will convert a client order to Packing Slip, 'Invoice' will convert a client order to Invoice and 'Delete' will delete a selected order or selected order items and change the screen to "Edit Client Order".

To Convert a Complete Order

Client Details						ltems No	colour legen ne in stock	d ——			/
Client code	Show only	orders in the c	Sort code		M	Not Not Iter	t enough st t enough st m on order	ock for a ock for t with oth	his orders his order er clients		
Clientorders	Orderitem	15									
Order #	Order date	Not before	Required by	How to supply	Late order?	~ /	^	Delivery	/ address		
1417	28/02/2009	29/04/2009	30/04/2009	Supply and Charge	Ask client			Christo	pher Brow	n	3
1416	28/02/2009	28/04/2009	29/04/2009	Supply and Charge	Aek client			9/5 Har	rewood Ro	bad	/
110							~	NOTE			2
UP Item code	DOWN	ime	All suppliable	tems	Order aty S	Shelf qty	Qty to ship	Note			×.
UP Item code 978089957	DOWN Item na	me	All suppliable	items	Order qty S	Shelf qty 10	Qty to ship 2	NOTE	Action Pac	king Slip	2
UP tem code 978089957 978089957	00000 tem na 16695 12505	ime internet	All suppliable	i items	Order qty S 2 3	Shelf qty 10 3	City to ship 2 3	Note	Action Pac	king Slip	
UP Item code 978089957 978089957 978089957	DOWN tem na '6695 '2505 '2611	me	All suppliable	items	Order aty S 2 3 5	Shelf qty 10 3 5	Cty to ship 2 3 5	NOTE	Action Pac	king Slip	2

To select all of the items in the order, double click on the order or select the order and click the [Down] button to place them into the lower selected items grid (*Fig 2.*).

To move an item from the lower selected items grid back to 'Client orders' double click on the item or select and click the [Up] button.

Fig 2. Convert Client Order to Packing Slip Screen

To Convert Selected Items from Orders

Client Details Client code	Show only orde	Sort code	···· · · · · · · · · · · · · · · · · ·	tems No ter	colour lege ne in stock t enough s t enough s n on order w	nd – tock tock dh o	for all orders for this order ther clients
Clientorders	Order items						
Order #	Item code	ITEM NAME	Order qty	Shelf qty	aty to ship	^	Order note
1415	9780899572505		3	3	0		2
1415	9780899572611		5	5	0		
1416		100000000000000000000000000000000000000	15	50	0		
1417	YW3201		1	-2	0		
						>	Amount to ship C
UP	DOWN	Other orders No s	stock	nsufficient	stock	×	Amount to ship C
UP Item code	DOWN	Other orders No s	stock I	nsufficient Shelf qty	stock Gity to ship	×	Amount to ship C Edit Save Cancel
UP Item code 978089957	DOWN Item name 6695 333333333	Other orders No s	stock [] Order qty 2	nsufficient Shelf qty	stock Gity to ship 2	×	Amount to ship C Edit Save Cancel
UP Item code 978089957	DOVVN Item name	Other orders No s	stock [] Order qty 2 10	nsufficient Shelf qty 10 45	stock Gity to ship 2 10	~	Amount to ship C Edit Save Cancel Action Packing Slip
UP Item code 978089957	bown ten nane 5695 300000000	Other orders No s	stock [1 Order qty] 2 10	nsufficient Shelf qty 10 45	stock Gty to ship 2 10		Amount to ship C

To select individual items select the 'Order items' tab. Select each item by double clicking or selecting the item and clicking the [Down] button to place them into the lower selected items grid *(Fig 3.)*. To move an item from the lower selected items grid back to 'Order items' double click on the item or select and click the [Up] button.

Fig 3. Convert Client Order to Packing Slip Screen

Item Information



Fig 5. Convert Client Order to Packing Slip Screen

To remove any items from the bottom grid *(Fig 5.)* that are not in stock click [No Stock].

To remove any items from the bottom grid where there is not enough stock to meet the whole order click [Insufficient Stock].

When all the items required to convert to Packing slip are in the bottom grid click [Process].

The "Packing Slip Screen" will appear displaying client and item details from the order. Process as usual.

To Supply Part of the Quantity of an Item

		Sort code	× M	None in stoc Not enough	k stock	for all orders
	Show only orde	rs in the current region		Item on or de	stock ir wit	h other clients
Clientorders	Orderitems					
Order #	tem code	Item name	Order qty	Shelf qty aty to ship	^	Order note
1415	9780899576695		2	10 (
1415	9780899572611		5	5 (
1416			15	50 0		
1416			10	45 (
1417	YW3201		1	-2		
1419			5	-4 (Amount to ship
1420	YW302		20	0	×	
UP	DOWN	Other orders No stock		nsufficient stock		Edit Save Cano
Item code	Item name	(Order qty	Shelf qty Gty to shi		
97808995725	05		3	3	2	Action Packing Slip

Select the item from the 'Order items' tab.

Click [Edit].

Change the quantity in 'Amount to ship'.

Click [Save].

The quantity that was entered will appear in the bottom grid as the 'Qty to ship'.

Note: To delete the balance of a partly supplied order refer to information sheet "Edit client orders (3.19)".

Fig 6. Convert Client Order to Packing Slip

To Convert Order(s) to Invoice

The "Convert Order(s) to Invoice" is the same screen as "Convert Order(s) to Packing slip" and allows you to covert an existing client order into an invoice. All or part of an order can be converted and the item quantity edited. Items from several orders can be combined onto one invoice. Go to "Clients | Convert | Order(s) to Invoice".



Fig 7. Convert Client Order to Invoice

Select the client. Select the order from 'Client orders' tab *(Fig 7.)*.

To select all of the items in the order, double click on the order or select the order and click the [Down] button to place them into the lower selected items grid.

To move an item from the lower selected items grid back to 'Client orders' double click on the item or select and click the [Up] button.

When all the items required to convert to Invoice are in the bottom grid click [Process].

The "Invoice" screen will appear displaying client and item details from the order. Process as usual.

To Convert Packing Slip(s) to Invoice

The "Convert Packing Slip(s) to Invoice" screen allows more than one client packing slip at a time to be converted to an invoice. It also allows you to cancel items from packing slips and to return entire packing slips or separate items back to orders/backorders. Go to "Clients | Convert | Packing slip(s) to invoice". See *(Fig 8)*.

Convert Packing Slip to Invoice



Select Client.

Select packing slip to display items. Double click on selected packing slip to place in 'Items to invoice' grid. Click [Process] to convert to invoice. Process or edit invoice as usual.

Fig 8. Convert Packing Slip(s) to Invoice Screen

Convert Packing Slip to Order

Available packing sites Pelip # Client code Name 1266 1264 1267 1268	Client code	tems tem code ▶ 97808995765	Nam <u>a</u> Sõ	Perantity 2	
1267					
X Cancel packing slip	to order		Packing slip Item to order	Cancel Item	~
Items to invoice		Confir	m		
		?	Return / Send Packin	g Slip # 1268 order Cancel	

Select Client.

Select packing slip to convert to order. Click [Packing slip to order]. A message box will appear asking you to confirm Return/Send Packing Slip #

to order. Click [OK].

The packing slip will be converted to an order and can be viewed in "Clients | View Client Orders".

Fig 9. Convert Packing Slip(s) to Invoice Screen

Convert Packing Slip Item to Order

Convert packing slip(s) to invoice Search Clent Available packing slips Order by Client code Paip # Client code Paip # Client code Paip # Client code Table Table Table Concel packing slip Packing slip to order Land to be longe	Current region (Head Office)	Select Client. Select Packing slip item to convert to order. Click [Packing slip item to order]. A message box will appear asking to confirm Return/Send Packing slip item to order. Entering a number less than the total amount of items on the packing slip returns only part of the packing slip to order. Click [OK]
Fig 10. Convert Packing Slip(s) to Invoice Screen	Return / Send Packing Slip item X Amount to return. (<3 returns part of the slip)	to an order and can be viewed in "Clients View Client Orders".

Converting through Client Orders, Invoice or Packing Slip

Orders can be converted to Invoice or Packing slip and Packing slips can be converted to Invoice through "Clients | Client orders", "Clients | Invoice", and "Clients | Packing slip". Orders can also be edited through these screens. All of these screens allow the 'Activity' to be changed to suit the action required.



Note: Only 1 conversion or action is allowed per Order, Invoice or Packing slip.