

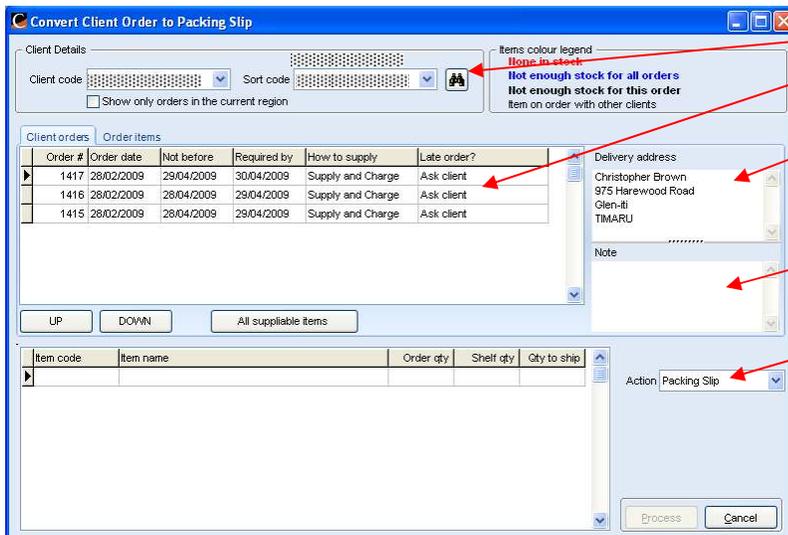
Convert Information Sheet

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 convert 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

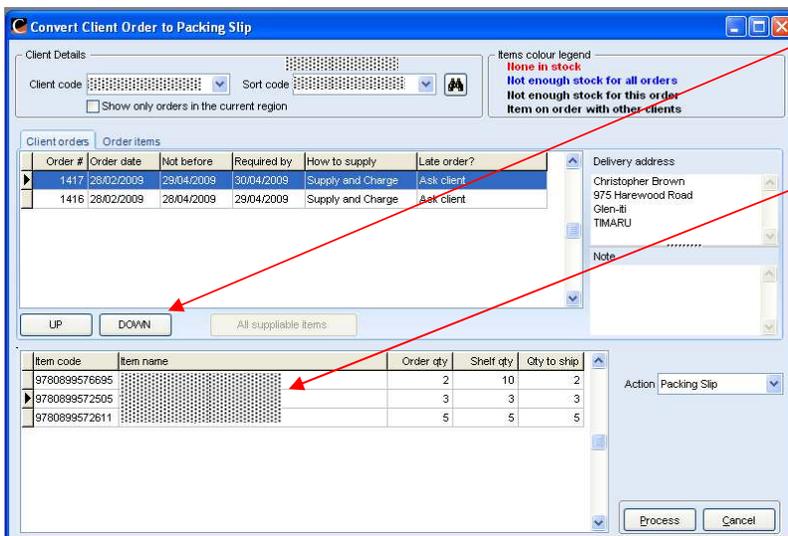


- Select the client.
- Select the order from 'Client orders' tab as in (Fig1.).
- The 'Delivery address' will display the address that the order is to be delivered to.
- 'Note' will display any notes made when the order was placed.
- The 'Action' option for the conversion should display Packing Slip.

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



- 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

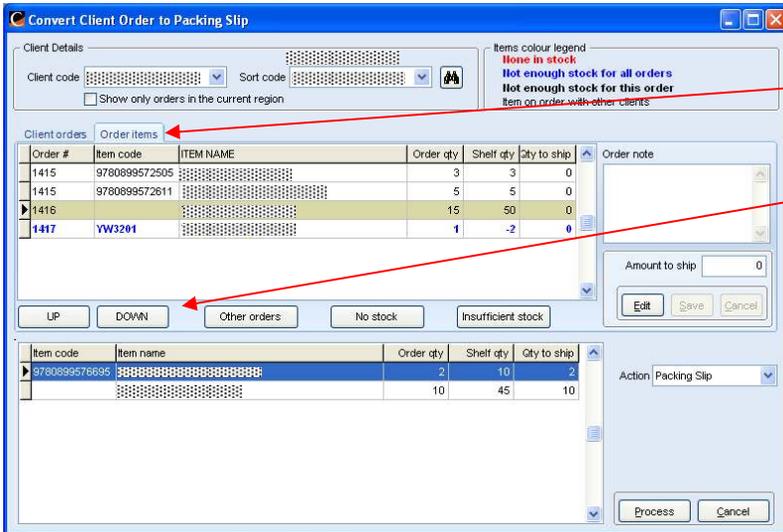


Fig 3. Convert Client Order to Packing Slip Screen

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.

Item Information

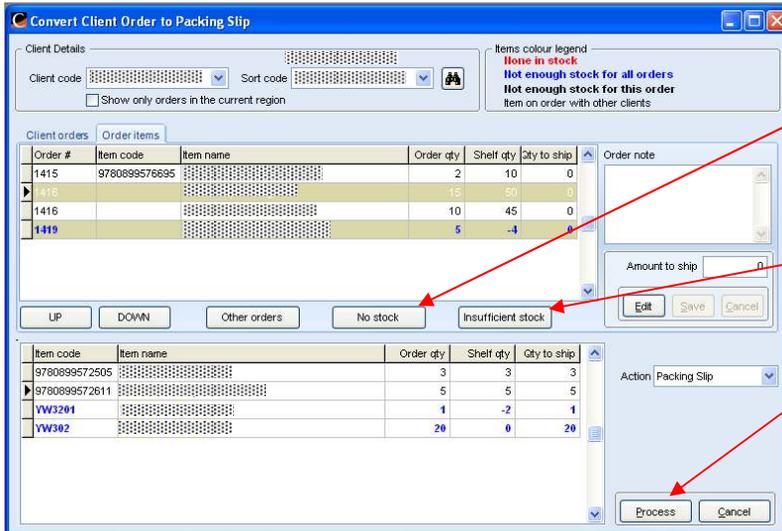


Fig 5. Convert Client Order to Packing Slip Screen

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

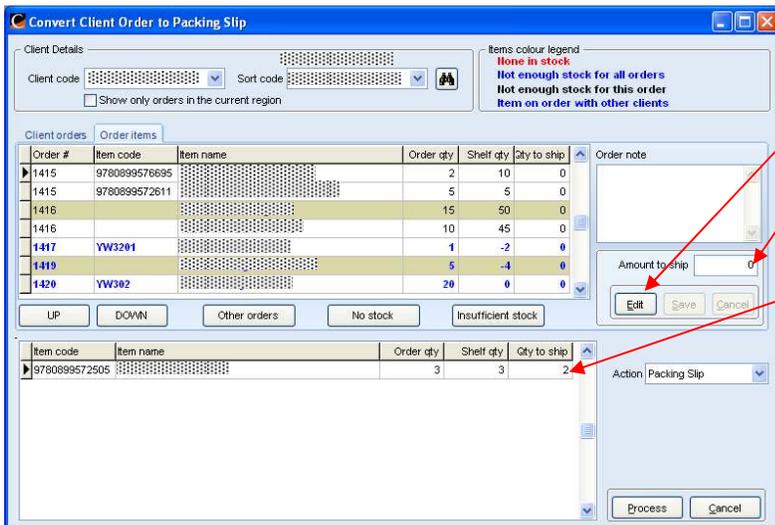


Fig 6. Convert Client Order to Packing Slip

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)".

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 convert 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".

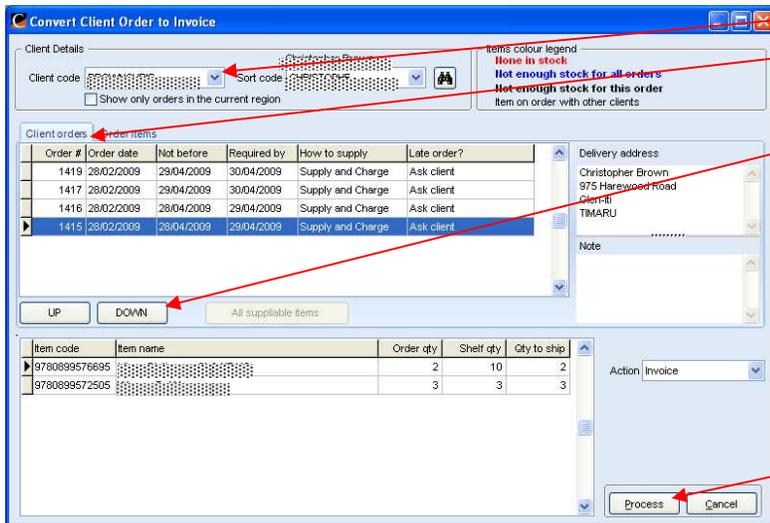


Fig 7. Convert Client Order to Invoice

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

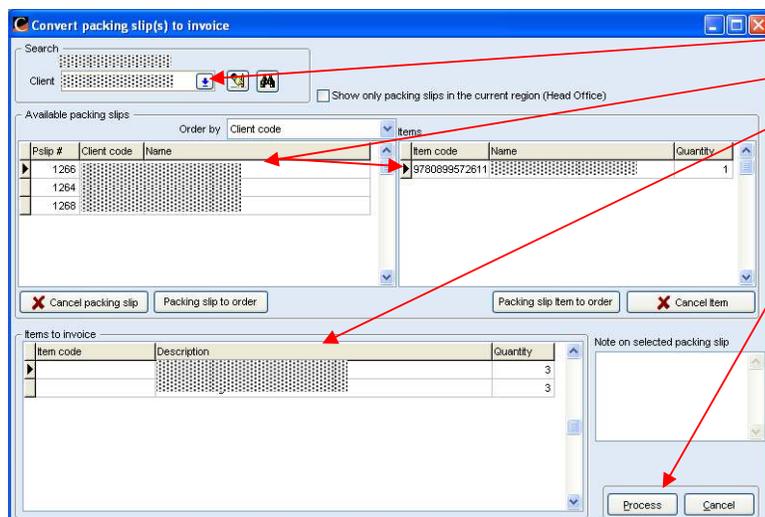


Fig 8. Convert Packing Slip(s) to Invoice Screen

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.

Convert Packing Slip to Order

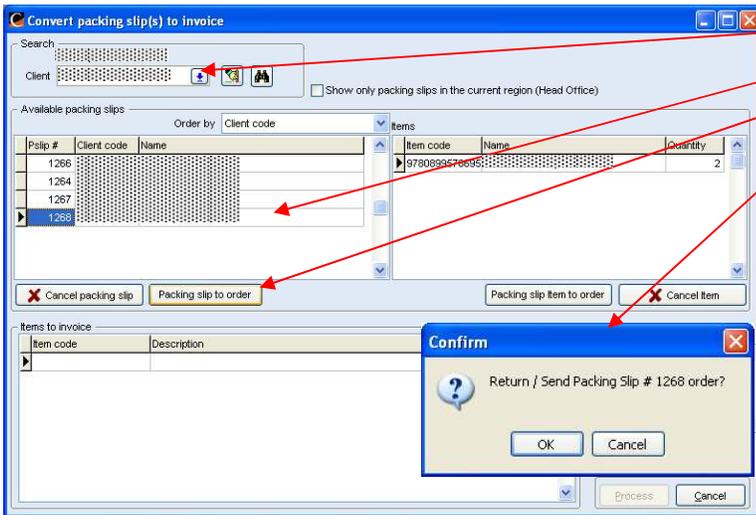


Fig 9. Convert Packing Slip(s) to Invoice Screen

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".

Convert Packing Slip Item to Order

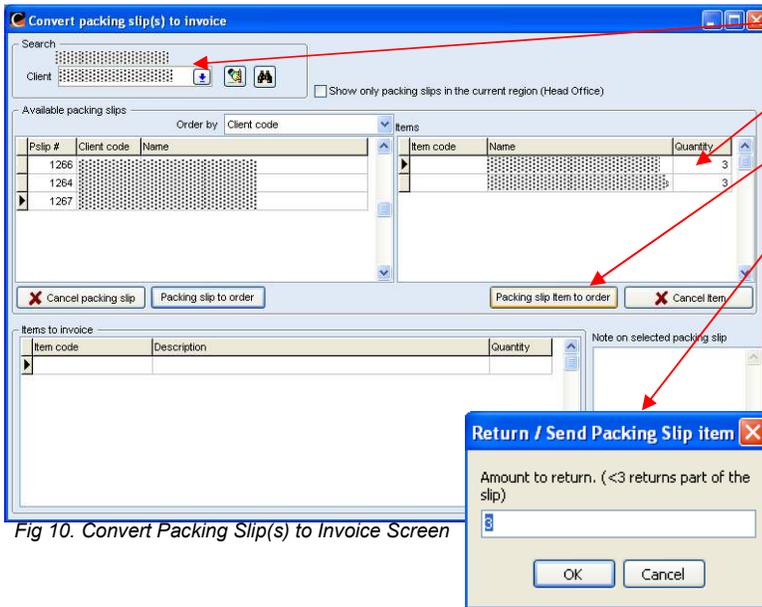


Fig 10. Convert Packing Slip(s) to Invoice Screen

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].
 The packing slip item will be converted 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.

Orderno	Orderdate	Reqdate
1417	28/02/2009	30/04/2009
1419	28/02/2009	30/04/2009
1422	28/02/2009	01/03/2009

Fig 11. Client Order to Packing Slip

Orderno	Orderdate	Reqdate
1417	28/02/2009	30/04/2009
1419	28/02/2009	30/04/2009
1422	28/02/2009	01/03/2009

Fig 12. Client Order to Invoice Screen

Pslpno	Pslpdate	Totalamt
1264	28/02/2009	209.85
1266	28/02/2009	34.95
1267	28/02/2009	50.10

Fig 13. Client Packing Slip to Invoice Screen

Orderno	Orderdate	Reqdate
1417	28/02/2009	30/04/2009
1419	28/02/2009	30/04/2009
1422	28/02/2009	01/03/2009

Fig 14. Edit Client Order Screen

Select Activity required.
 Select Client.
 Select Order (Fig 11. & 12.).
 Double click on order or click [Send to slip] or [Send to Invoice] to place order into a packing slip form.
 Click to cancel the activity.
 This will not cancel the order.

Select Activity required.
 Select Client.
 Select Packing Slip (Fig 13.).
 Double click on packing slip or click [Send to Invoice] to place packing slip into an Invoice form.
 Click to cancel the activity.
 This will not cancel the packing slip.

Select Activity required.
 Select Client.
 Select Order see (Fig 14.).
 Double click on Order or click [Edit client order] to open order for editing.
 Click to cancel the activity.
 This will not cancel the packing slip.

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