

# Order Management

Overviews the procedures for creating, editing, tracking and canceling orders

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# Using the Quick Quoter

# Converting a Quote to an Order

# Converting an Order to a Project

# Cart vs Quote vs Order vs Project - Understanding Terminology

# Searching For Orders

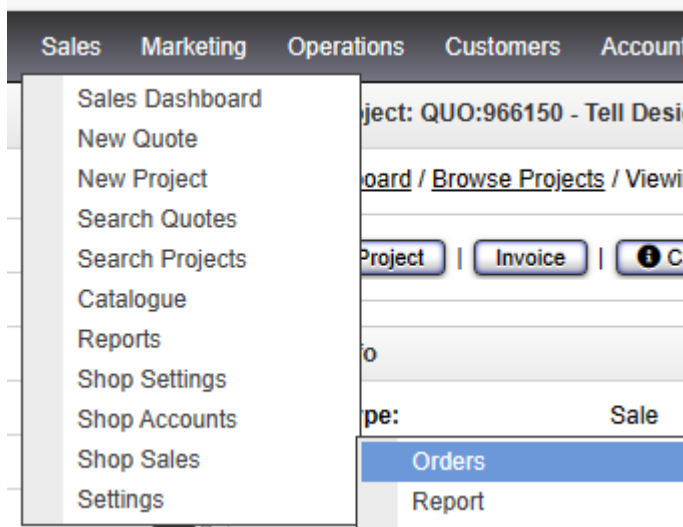
To search for an order - you will need the Quote Reference or a WEB reference.

Online orders will begin with **WEB** followed by numbers

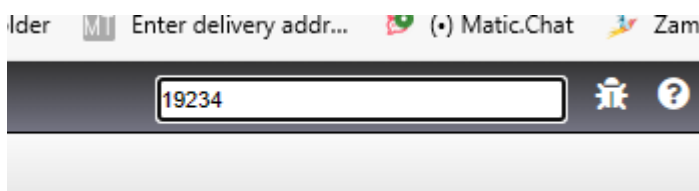
Quote numbers will begin with a **QUO**: followed by numbers

Next Day Poster Orders will begin with **NDP**/ followed by numbers.

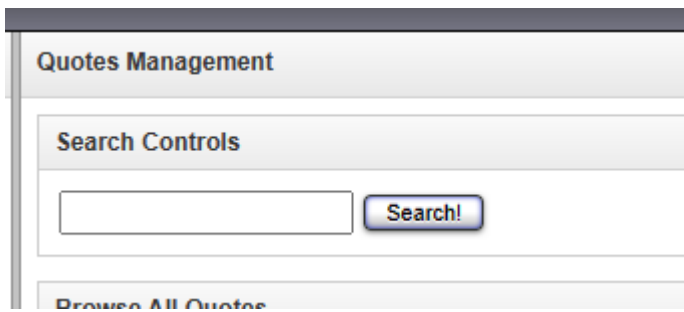
If it is an **Order** you are tracing - Select SALES / Shop Sales / Orders



This will bring up the order screen - Add your ref number to the top bar on the right hand side and hit enter -



If it is a **Quote** you are tracing - Select Sales / Search Quote / this will bring up this screen



The screenshot shows a web application interface with a dark grey header bar. Below the header, there is a light grey box titled "Quotes Management". Inside this box, there is a sub-section titled "Search Controls". This section contains a text input field and a "Search!" button. Below the "Search Controls" section, there is a link that says "Browse All Quotes".

Ad in the ref number and click search.

Make sure there are no spaces when you add the number, etc otherwise the search wont work.

# Order Status / Order Tracking



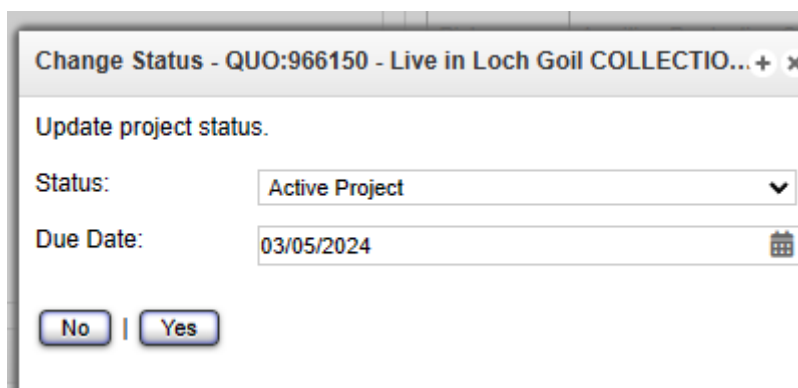
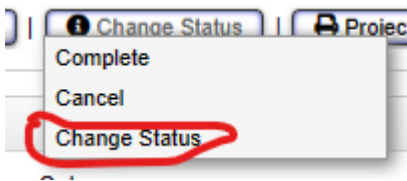
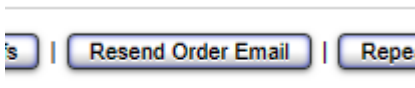
# Changing an Order's Status

# Resending an Order Email/Receipt

Orders placed on line will allow the customer to select their own dispatch date.

However, on occasion, the date for dispatch will change.

To advise the customer of the change of date, please change it on the system first and Resend the Order Confirmation

A screenshot of a dialog box titled 'Change Status - QUO:966150 - Live in Loch Goil COLLECTIO...'. The dialog box contains the text 'Update project status.' and two input fields: 'Status:' with a dropdown menu showing 'Active Project' and 'Due Date:' with a date field showing '03/05/2024'. At the bottom, there are two buttons: 'No' and 'Yes'.

Resend Order Email?

+

×

Fill in the form below to edit the .

1. Details

Subject\*:

Copy Order Receipt

Status:

Converted To Project

▼

Message:

Save

You can also use the Template emails if you prefer.

# Sending a Copy Invoice

There are two methods for getting copy invoices, directly from the Matic Track or from our accounts software Xero.

## Sending from MaticTrack

1. Go to the **Project** you want a copy invoice for
2. Under the invoices section you will see all the invoice related to this Project
3. If an invoice is viewable there will be a **"View Invoice"** button
4. Click the button to view the invoice

Invoices				
SAGE REF	TOTAL	START DATE	INVOICED DATE	OPTIONS
QUO:928011	£18.49	2022-05-20 17:13:38	2022-05-20 00:00:00	<a href="#">Delete</a> <a href="#">View Invoice</a>

5. You can then copy the Invoice URL from the URL Bar

Outstanding bills 13,085.87 GBP

Pay now 22.19 GBP

Save to PDF CSV Xero

**TAX INVOICE**

**maticmedia**

To: [Redacted] Road  
[Redacted] DOM

From: Matic Media Services Limited  
Unit 9-11  
Hagmill Road  
Shawhead Industrial Estate  
Coatbridge  
North Lanarkshire  
ML5 4XD  
UNITED KINGDOM

Account Number  
Invoice Number  
Reference 112438  
VAT Number 878098854  
Issued 20 May 2022  
Due 19 June 2022, Due in 19 days

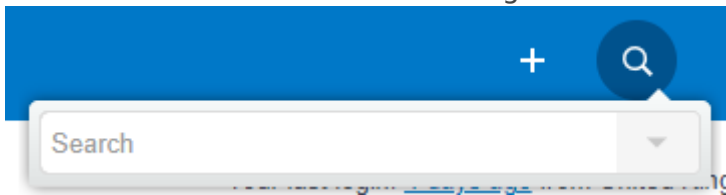
Description	Quantity	Unit Price	VAT	Amount GBP
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6. Or you can download a pdf using the buttons at the top right

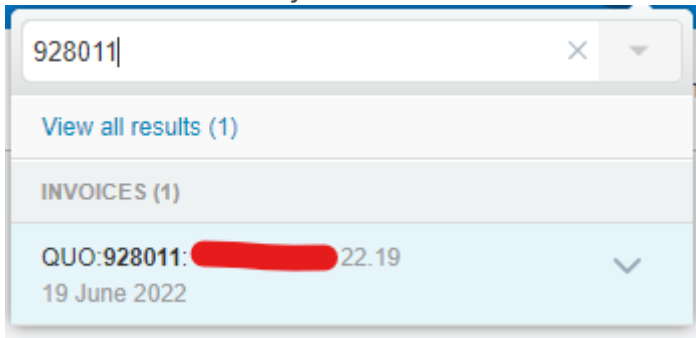


## Sending from Xero

1. Log into Xero
2. Search for the Invoice Number using the search bar



3. Click on the Invoice you want to View



4. To download as a PDF

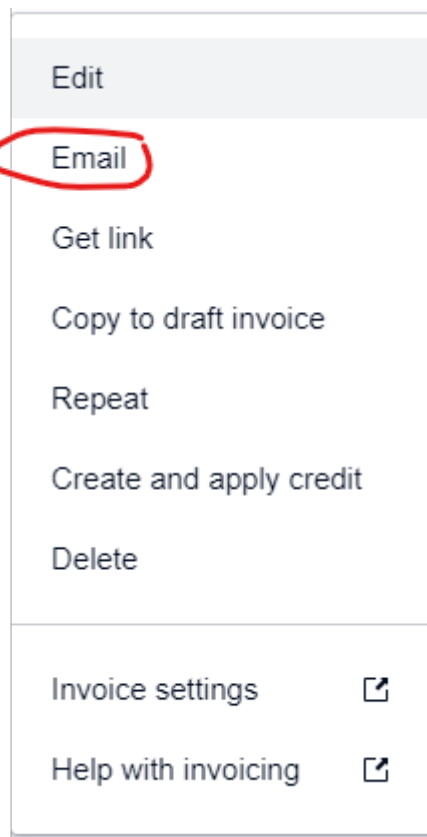


5. To Email directly to customer

1. Click the three vertical dots



2. Click Email



3. Add any additional emails and decide if you want to attach the invoice as a PDF or link to the Xero to view online

## Send invoice



accounting@

Invoice QUO:928011 from Matic Media Services Limited for Linden Signs

Hi Gillian,

Here's invoice QUO:928011 for GBP 22.19.

The amount outstanding of GBP 22.19 is due on 19 June 2022.

View your bill online:

From your online bill you can print a PDF, export a CSV, or create a free login and view your outstanding bills.

If you have any questions, please let us know.

Thanks,

Matic Media Services Limited

☐ Send me a copy

☐ Attach PDF

Cancel

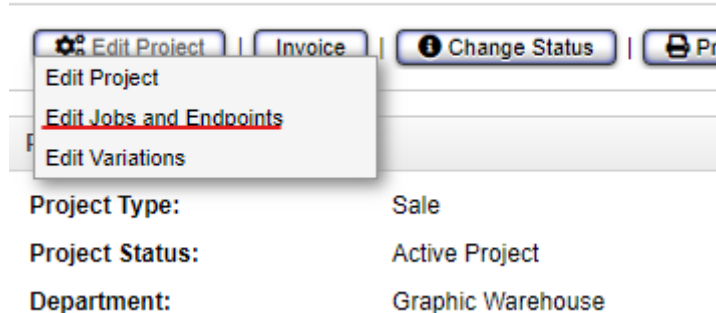
Send

Subtotal

# Uploading Multiple Delivery Address to a Project

1. Go to the Project > Edit Jobs and Endpoints Screen

[Sales Dashboard](#) / [Browse Projects](#) / [Viewing Project - QUO:92851](#)



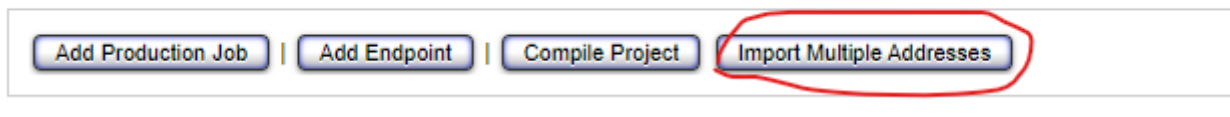
**Edit Project** | **Invoice** | **Change Status** | **Print**

- Edit Project
- Edit Jobs and Endpoints
- Edit Variations

**Project Type:** Sale  
**Project Status:** Active Project  
**Department:** Graphic Warehouse

2. Click Import Multiple Addresses

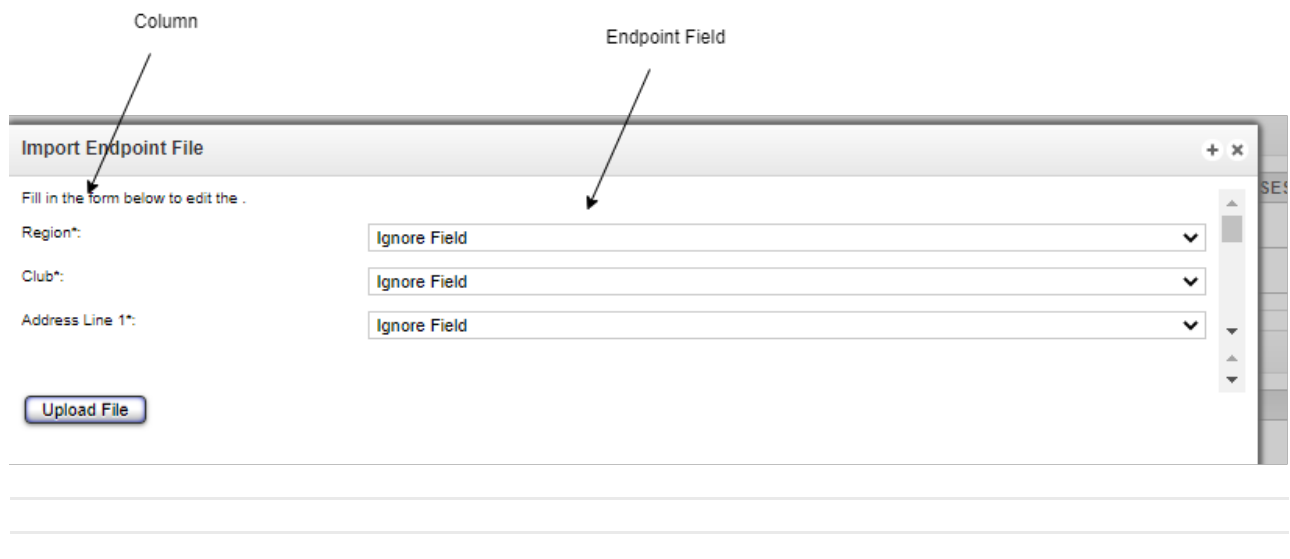
[Sales Dashboard](#) / [Browse Projects](#) / [Viewing Project -QUO:928513 - Banners & Roll Ups](#) / [Edit Project Jobs](#)



**Add Production Job** | **Add Endpoint** | **Compile Project** | **Import Multiple Addresses**

3. Upload an Excel Document with minimum the columns, FAO, Address, City, Postcode

4. Match the Columns to the Fields



**Import Endpoint File**

Fill in the form below to edit the .

**Region\*:** Ignore Field

**Club\*:** Ignore Field

**Address Line 1\*:** Ignore Field

**Upload File**



5. After matching fields click "Save"

The screenshot shows a dialog box titled "Import Endpoint File" with a close button (X) in the top right corner. On the left side, there are three labels: "Column - 27\*", "Column - 28\*", and "Column - 29\*", each followed by a dropdown menu. All three dropdown menus are currently set to "Ignore Field". Below these dropdowns is a "Save" button, which is highlighted by a red circle. At the bottom left of the dialog, there is an "Upload File" button. The background of the application window is partially visible on the left, showing a sidebar with options like "Sided - C" and "Single S".

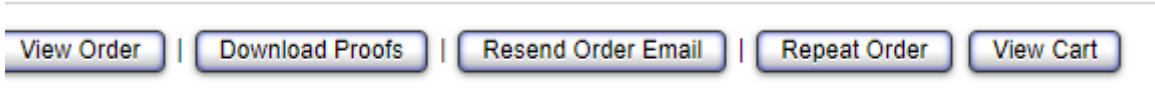
Column	Field
Column - 27*	Ignore Field
Column - 28*	Ignore Field
Column - 29*	Ignore Field

Save

Upload File

# REPEAT ORDER

1. Click on order you want to repeat then click view cart



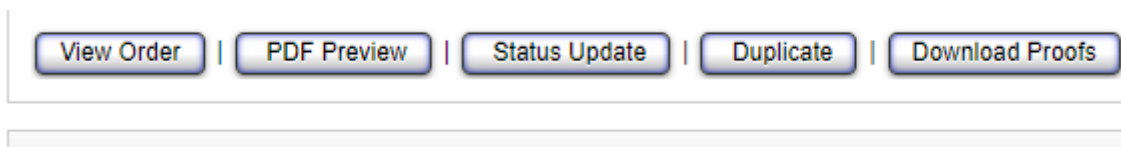
then click on Cart View so that you are logged in as the customer you are doing repeat order for

**Predicted Conversion:** 2022-10-06 00:00:00  
**Department:** Graphic Warehouse  
**Sales Person:** Patrick Spencer  
**Quote View:** [Open](#)  
**Cart View:** [Open](#)

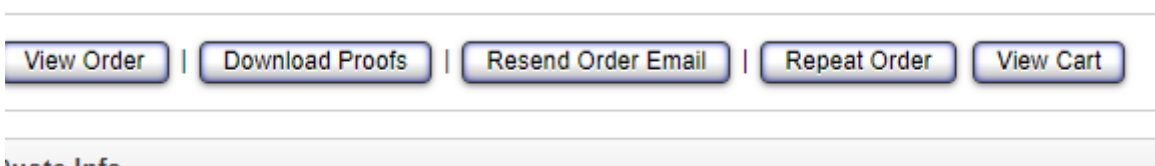
when cart view comes up you then close it down



and go back to Viewing quote and click view order



2. Click on order you want to repeat and click Repeat Order button



2. It will take you to this click Yes

Repeat this order?

No

Yes

3. When you click yes it will take you to the cart page on the web, where you will be able to process your order in the usual manner. Please make sure that you are logged in as customer that you are doing the repeat order for, you will see this at the top of the cart

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If it's a credit account, you enter the PO as normal or if it's a pay on order then you just add the credit card details as normal.