Order Management

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

- 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
- Order Status / Order Tracking
- Changing an Order's Status
- Resending an Order Email/Receipt
- Sending a Copy Invoice
- Uploading Multiple Delivery Address to a Project
- REPEAT ORDER

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

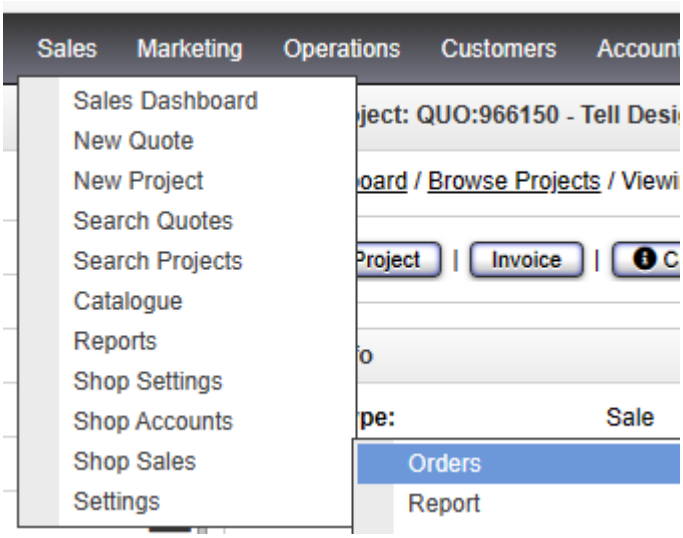
To search for an order - you will need the Quote Reference or a WEB reference.

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

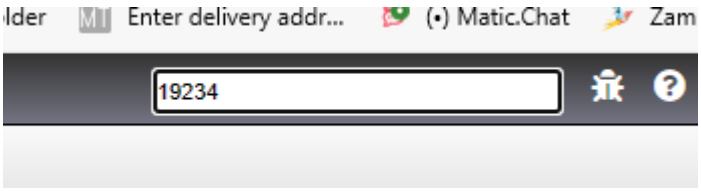
Quote numbers will begin with a **QUO**: followed by numbers

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

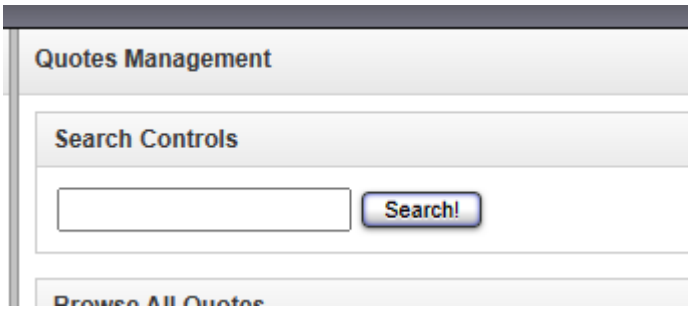
If it is an **Order** you are tracing - Select SALES / Shop Sales / Orders



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



Ad din 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

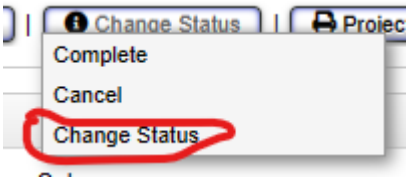
Changing an Order's Status

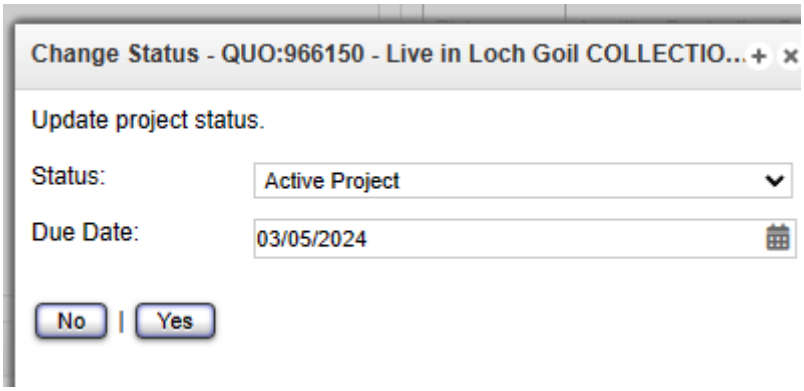
Resending an Order Email/Receipt

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

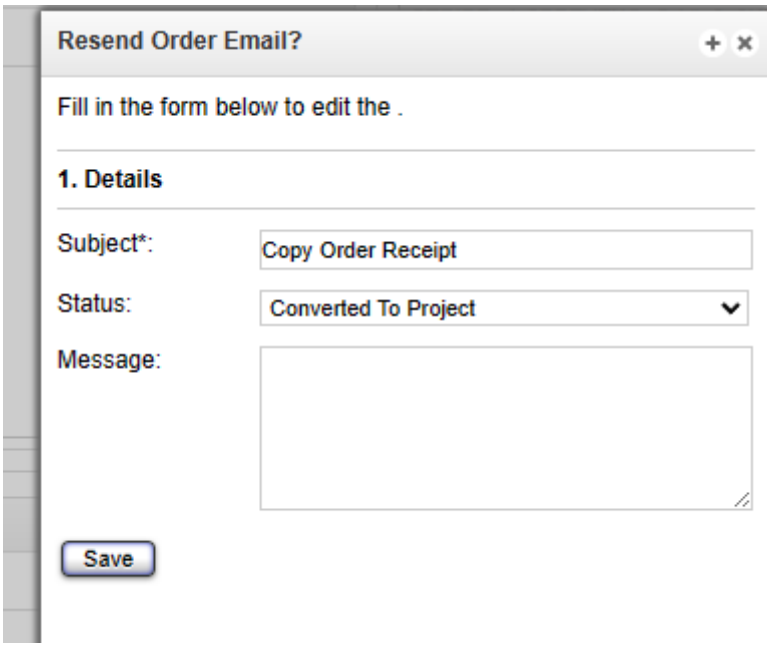
However, on occasion, the date for dispatch will change.

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









You can also use the Template emails if you prefer.

Sending a Copy Invoice

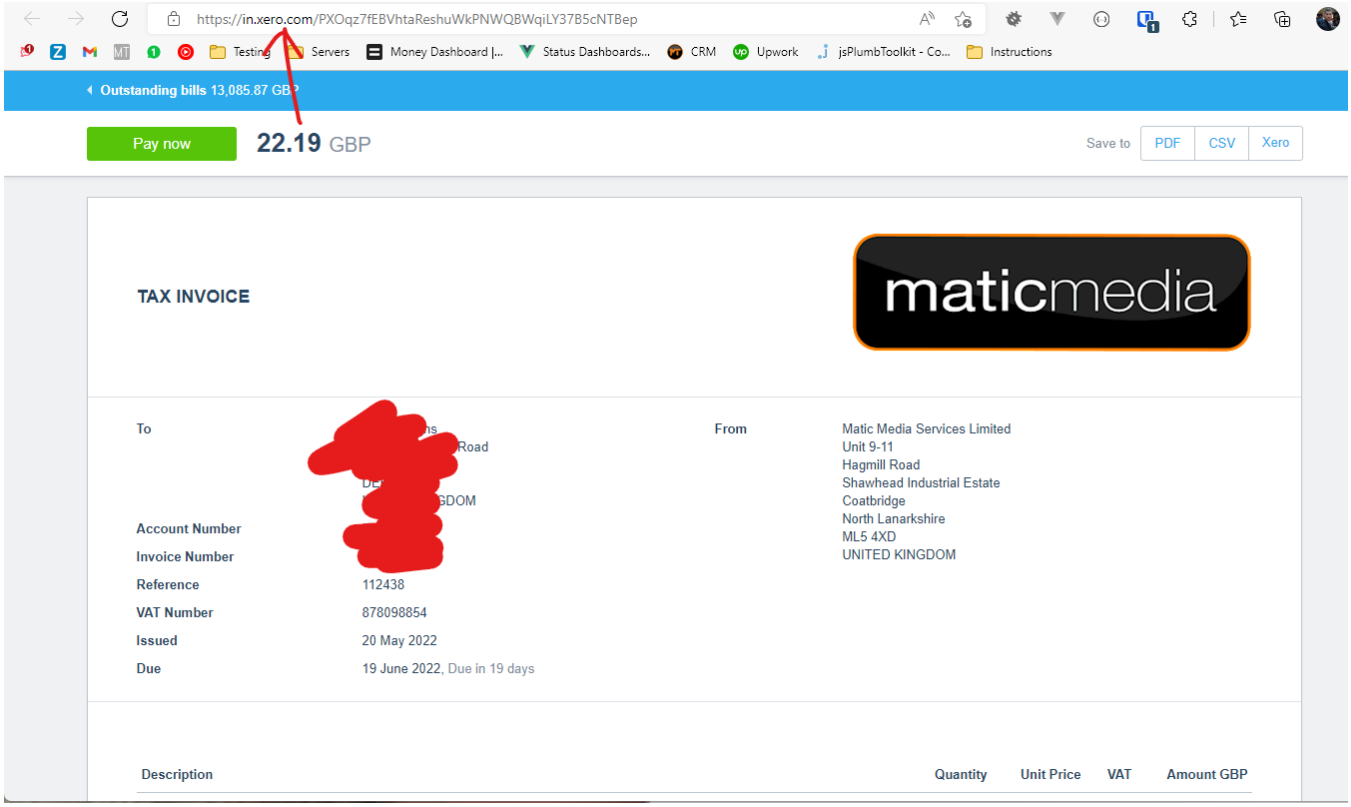
There are two methods for getting copy invoices, directly from the Matic Track or from our accounts software Xero.

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



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

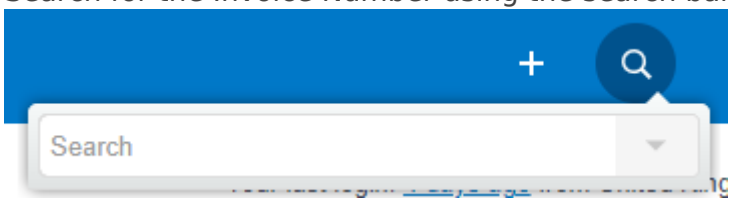


6. Or you can download a pdf using the buttons at the top right

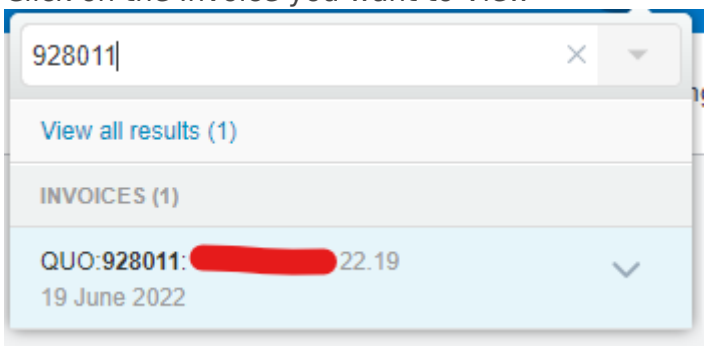


Sending from Xero

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



3. Click on the Invoice you want to View

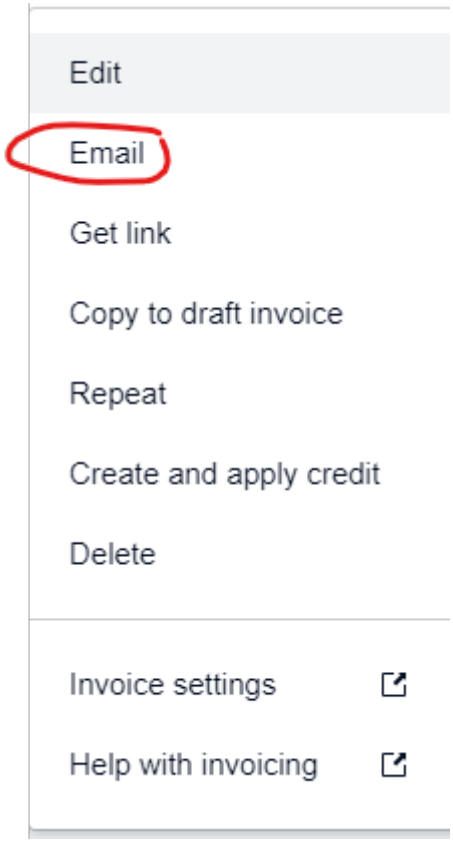


4. To download as a PDF

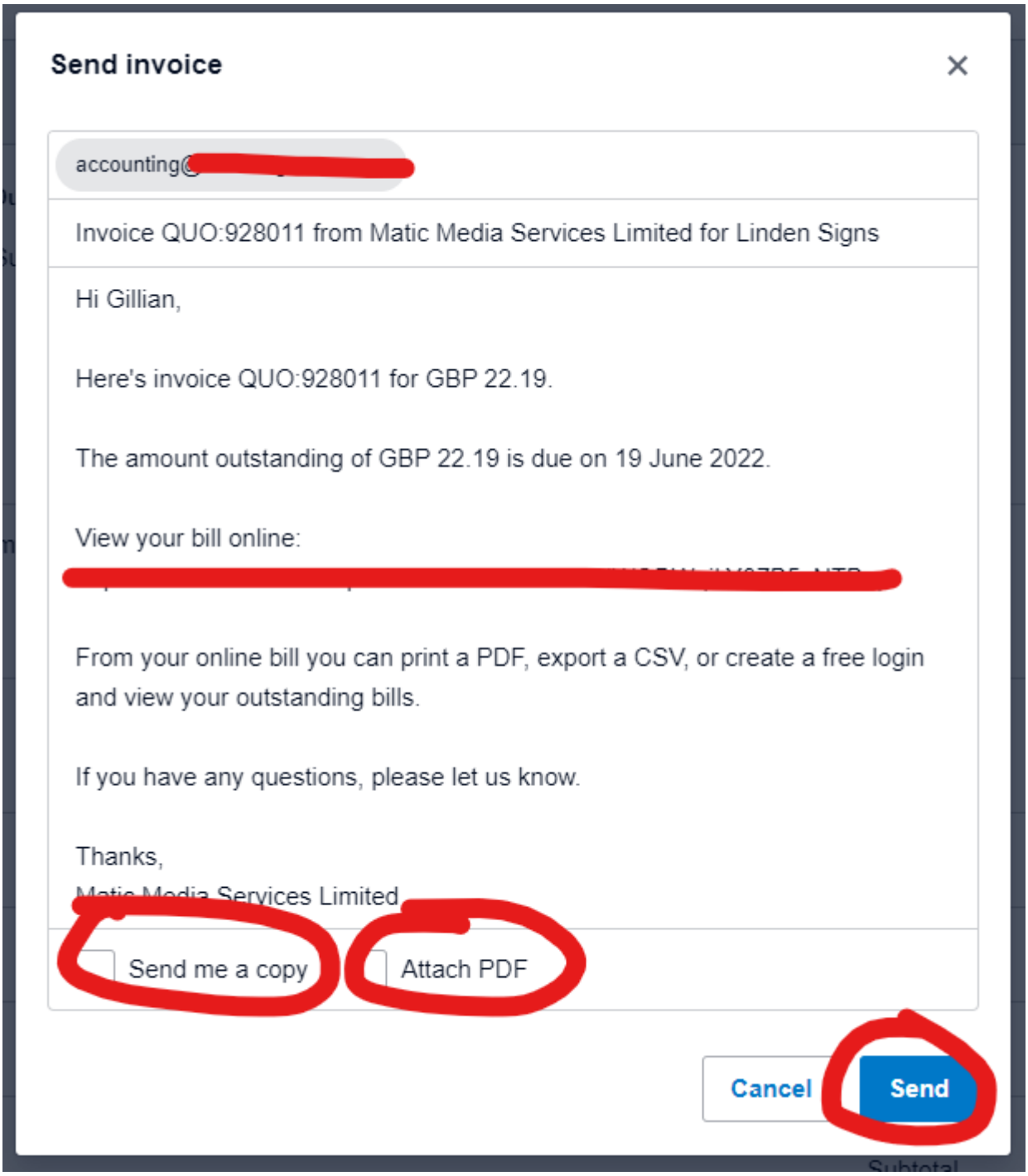


5. To Email directly to customer
    1. Click the three vertical dots

    2. Click Email

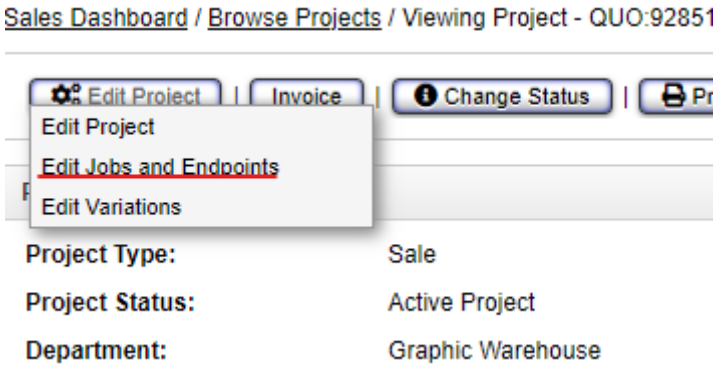


3. Add any additional emails and decide if you want to attach the invoice as a PDF or link to the Xero to view online

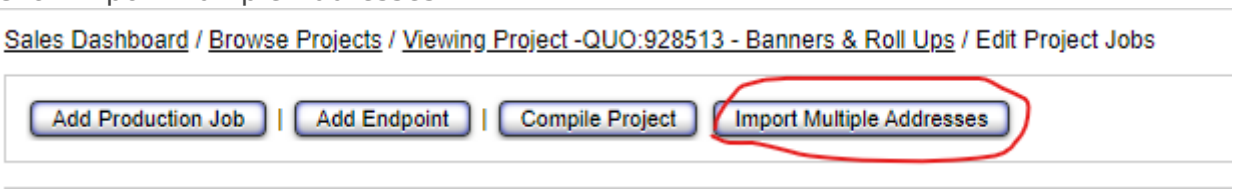

Send invoice
accounting@
Invoice QUO:928011 from Matic Media Services Limited for Linden Signs
Hi Gillian,
Here's invoice QUO:928011 for GBP 22.19.
The amount outstanding of GBP 22.19 is due on 19 June 2022.
View your bill online:
From your online bill you can print a PDF, export a CSV, or create a free 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

Uploading Multiple Delivery Address to a Project

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

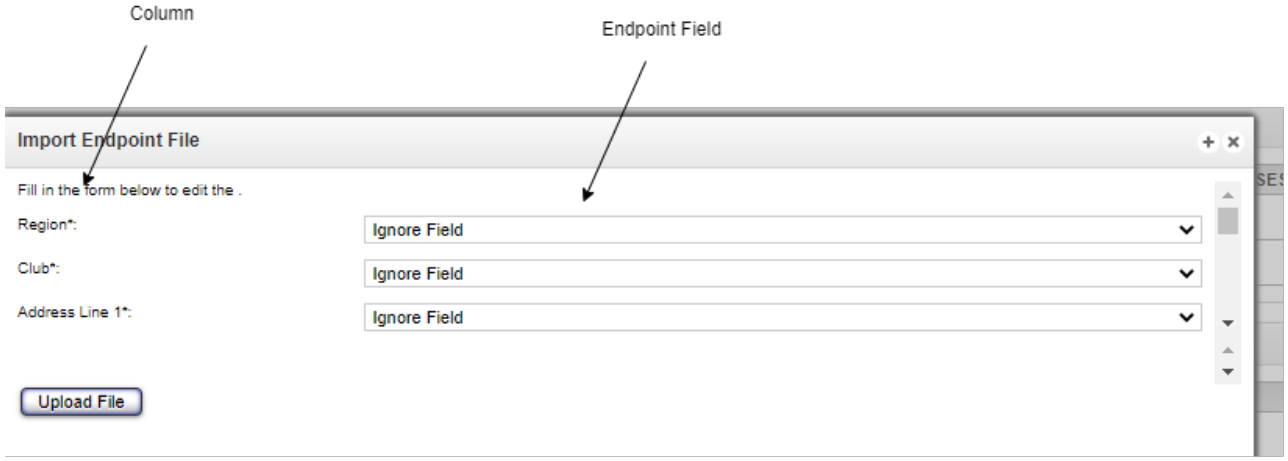


2. Click Import Multiple Addresses

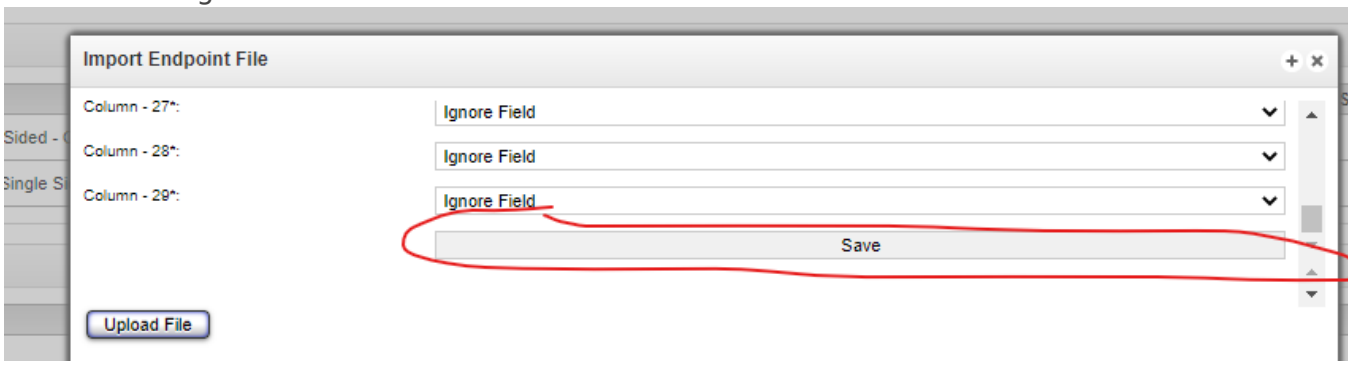


3. Upload an Excel Document with minimum the columns, FAO, Address, City, Postcode

4. Match the Columns to the Fields

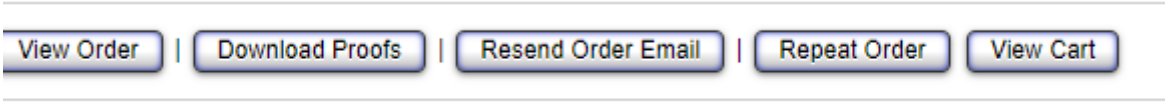


5. After matching fields click "Save"

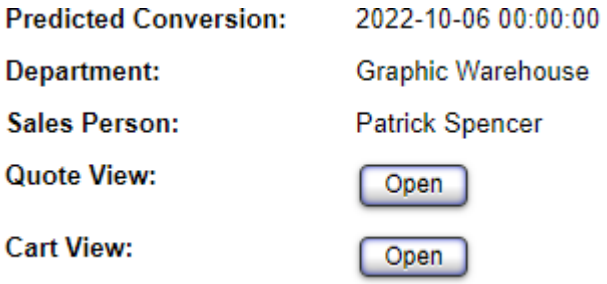


REPEAT ORDER

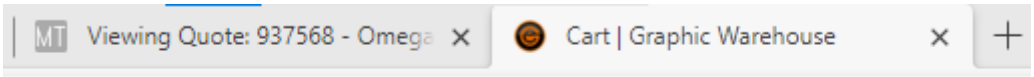
1.Click on order you want to repeat then click view cart



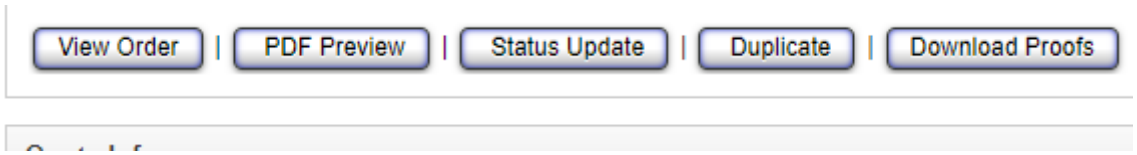
then click on Cart View so that you are logged in as the customer you are doing repeat order for



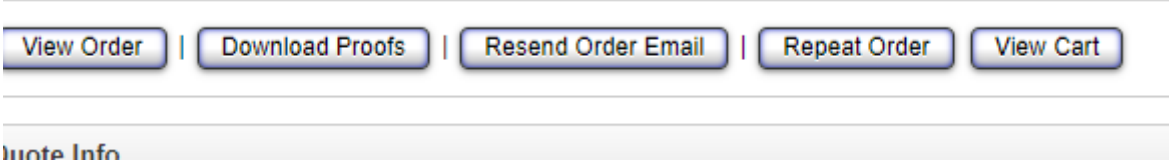
when cart view comes up you then close it down



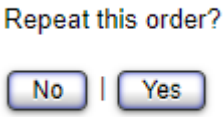
and go back to Viewing quote and click view order



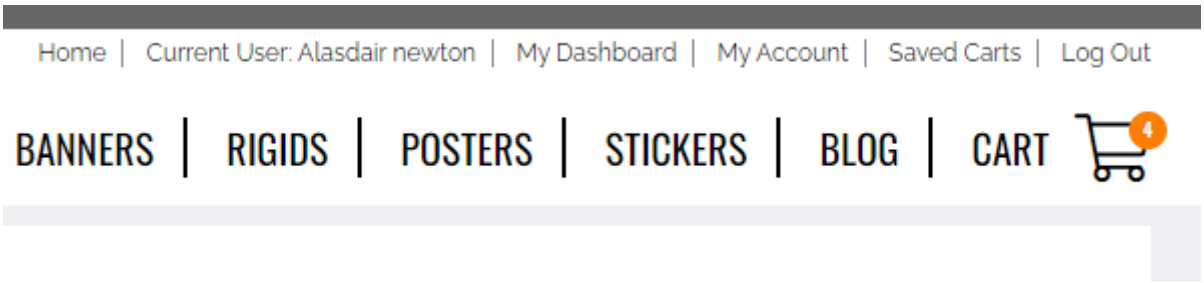
2. Click on order you want to repeat and click Repeat Order button



2. It will take you to this click Yes



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



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.