

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

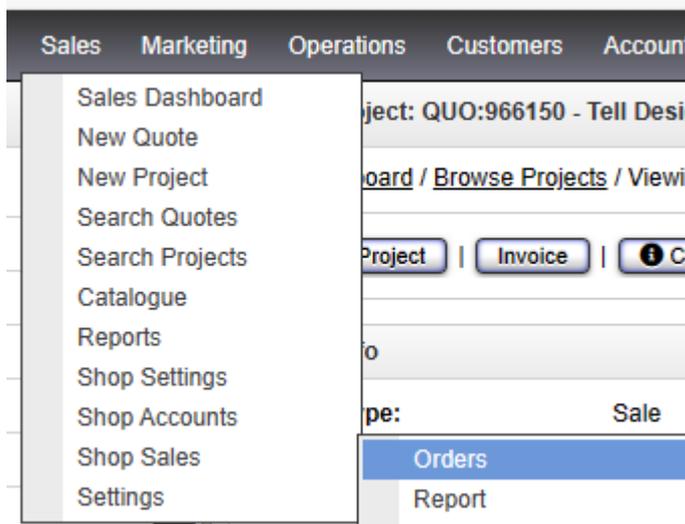
To search for an order - you will need the Quote Reference or a WEB reference.

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

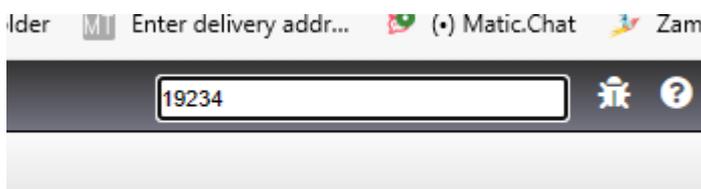
Quote numbers will begin with a **QUO**: followed by numbers

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 image shows a screenshot of a web application interface. At the top, there is a dark grey header bar. Below it, a light grey box contains the text "Quotes Management". Underneath this, another light grey box is labeled "Search Controls". Inside the "Search Controls" box, there is a white rectangular input field on the left and a blue button with the text "Search!" on the right. Below the "Search Controls" box, there is a light grey box with the text "Browse All Quotes" partially visible.

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

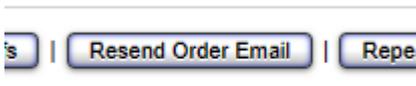
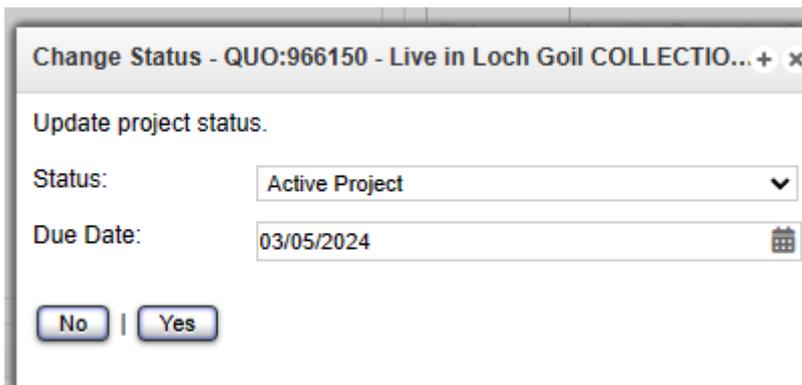
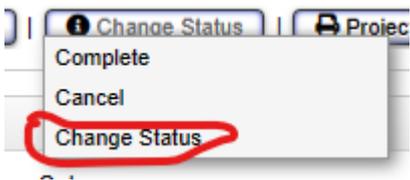
Changing an Order's Status

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



Resend Order Email? + x

Fill in the form below to edit the .

1. Details

Subject*:

Status: ▼

Message:

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

SAGE REF	TOTAL	START DATE	INVOICED DATE	OPTIONS
QUO:928011	£18.49	2022-05-20 17:13:38	2022-05-20 00:00:00	Delete View Invoice

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
VAT Number
Issued
Due

112438
878098854
20 May 2022
19 June 2022, Due in 19 days

Description

Quantity Unit Price VAT Amount GBP

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

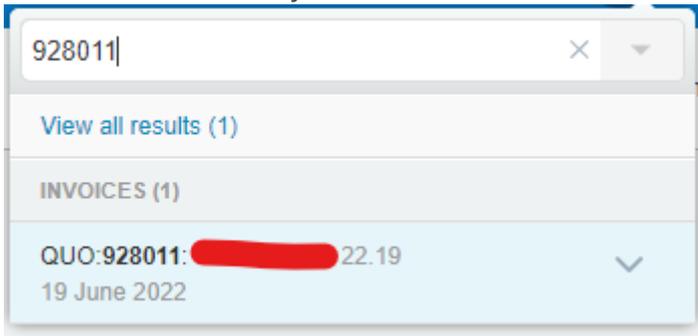


Sending from Xero

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

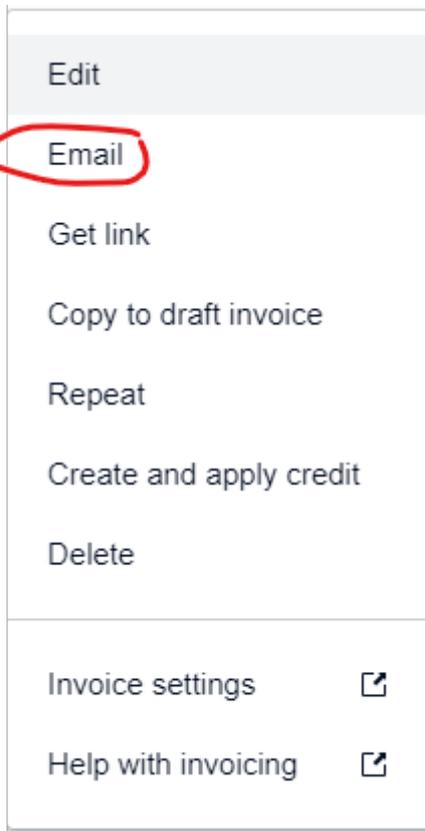


5. To Email directly to customer

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

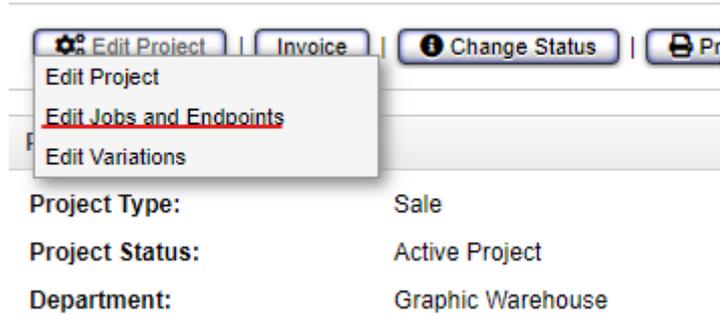
Send

Subtotal

Uploading Multiple Delivery Address to a Project

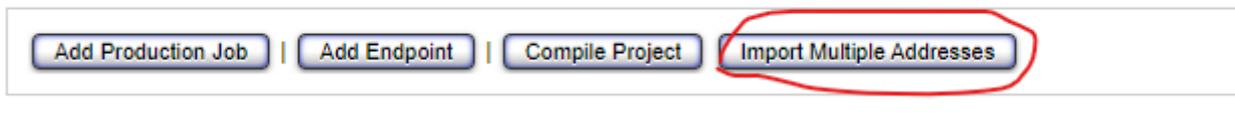
1. Go to the Project > Edit Jobs and Endpoints Screen

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



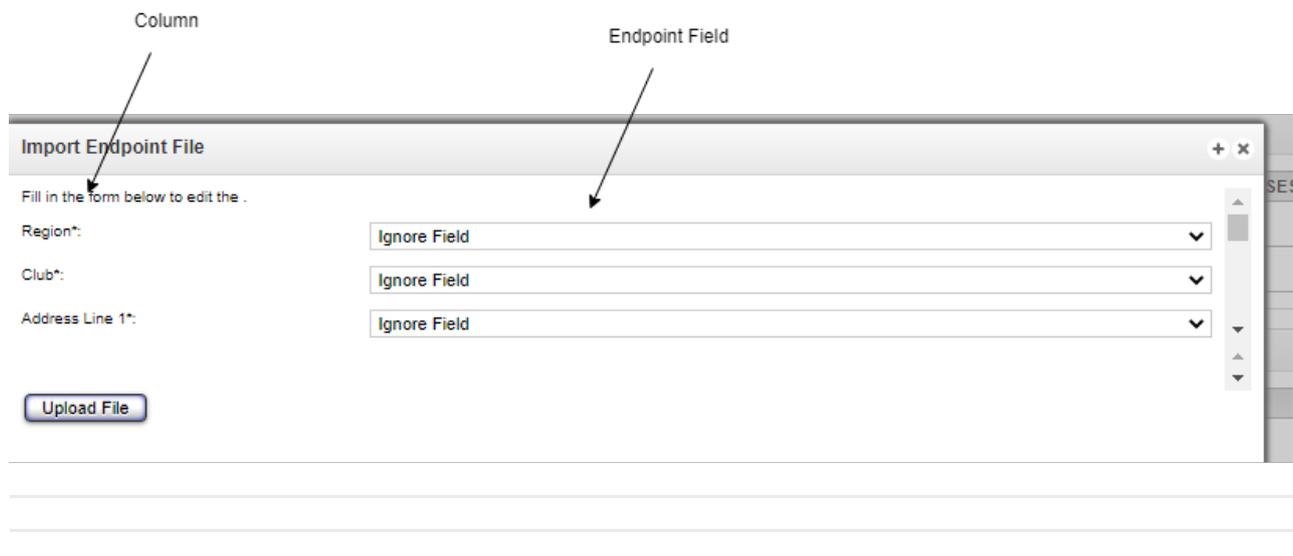
2. Click Import Multiple Addresses

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



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

4. Match the Columns to the Fields

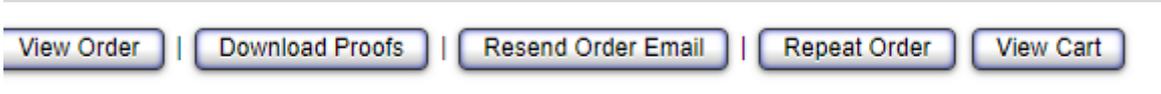


5. After matching fields click "Save"



REPEAT ORDER

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



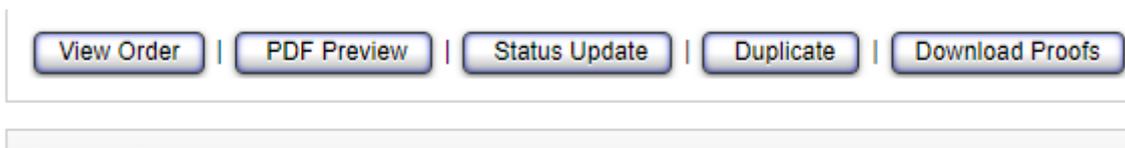
then click on Cart View so that you are logged in as the customer you are doing repeat order for

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

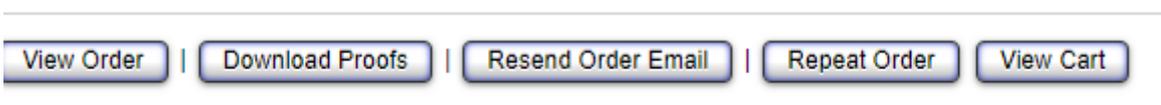
when cart view comes up you then close it down



and go back to Viewing quote and click view order



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



Quote Info

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.