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SUREFIRE SYSTEMS

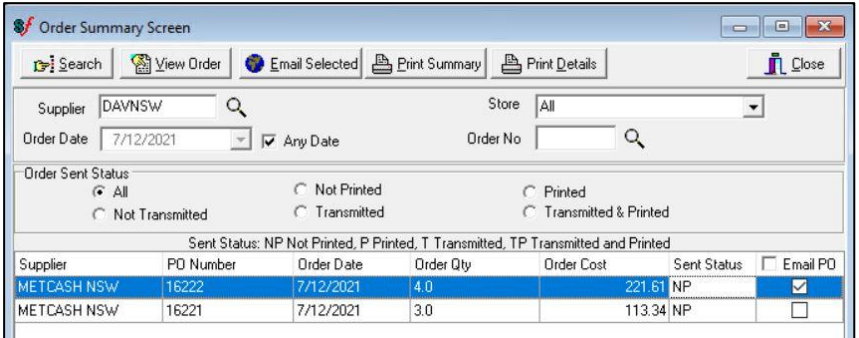| INV-2g	*Page| 1 of 2*
Category	Inventory
Course	Ordering
Version	1.1
Client	Generic
Software	2.18.4.64

View a List of Outstanding Orders

You can retrieve a list of every outstanding order in SURE*fire;* the list can be filtered by Supplier, Date Created, Order Number, or Order Sent status.

You can also bulk-email orders to selected suppliers.

Procedure to Retrieve a List of Orders or a Specific Order

Hints and Tips

✓ Use the **Purchase Order Summary** function to:
  - find an order number to add to or modify it
  - view a list of supplier orders generated from a split store order
  - view a list of orders for a specific supplier
  - select an order to display on the Purchase Order screen
  - Select one or several Directs orders to email (if enabled)
  - check if an order has been printed or transmitted (using the **Sent Status**).

✓ Orders that have been finalised against an invoice don't display.

✓ You can't edit an order that has been transmitted; you can only view it or transmit it again.

✓ Leave the **Supplier** field blank to retrieve every outstanding order in the system.

✓ **Order Sent Status** filter:
  - **All:** lists every order.
  - **Not Printed:** lists orders that haven't been printed.
  - **Printed:** lists orders which have been printed.
  - **Not Transmitted**: lists orders that have not be sent yet (exported via V7 or emailed).
  - **Transmitted**: lists orders that have been sent to the supplier (exported via v7 or emailed)
  - **Transmitted and Printed**: lists orders either sent to the supplier OR have been printed.
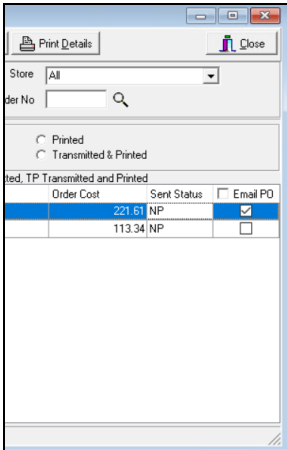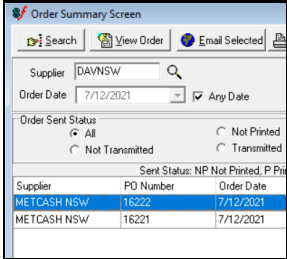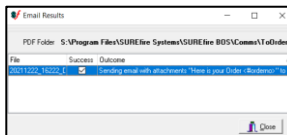
✓ Click a column header to sort the rows returned.

1.	From the BOS **Payables** menu, select **Purchase Order Summary**.	
2.	Enter the required search criteria. *The **Store** field isn't used; the system only retrieves orders created in your store.* *Select the **Any Date** check box if you don't know the exact date the order/s were created.* *Or leave at defaults.*	
3.	Click **Search**.	

4.	To:	then:
	print the search results	click **Print Summary**. On the report preview, click **Print** to print the report. *Click **Print Setup** first, if you need to change the printer.*
	print an order (includes product detail)	click **Print Details**. On the report preview, click **Print** to print the report. *Click **Print Setup** first, if you need to change the printer.*

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Hints and Tips

✓ There are three parts to set up before you can use the email feature in Surefire; refer to TECH-3i Configure Emailing of Direct Orders and EOP Statements Fact Sheet

1. In BOS **Properties | Email,** enter the Email Account Credentials for your business.
2. Customise the Template for the automated email that gets sent to recipients.
3. Ensure each Supplier recipient has an email saved in their Account.

5.	To:	then:
	Email order/s to Supplier/s	It's recommended that you **View Order** if you haven't reviewed the order yet.
		Select the **Email PO** check box against each order you want to send now.
		You can only select an order for email-ready suppliers; hover the mouse over the check box to see the email/s saved.
		Click **Email Selected.**
		The system generates the emails and displays a confirmation message once complete. You can sort by any column.
		Note: if you need a copy of the Email Results, use the Windows Snipping app to save a copy. An action for this may be available in a future release.
		Click **Close.**
		A copy of the PDF and logs is saved; see Hints & Tips.
	view or edit the products in an order	click the order to highlight it.
		Click **View Order.**
		View the order or modify it (if it hasn't been sent).
	exit the screen	click **Close.**