

eTurns

Orders

[Help documentation](#)



Contents

Order hierarchy:	2
Guidelines	3
a. Place a New order:.....	3
b. Edit an existing order:	7
c. Delete an order:.....	7
d. Export the page:	8
e. View change log for an order:	8
f. Search the Order for keyword:.....	9
g. View records and go to specific page:	12
h. Implement various settings:.....	12
i. Miscellaneous settings:.....	13

Order hierarchy:

Each Order consists list of commodities available by a specified Supplier to be ordered simultaneously for user convenience.

An order goes through the following stages from when it is placed, till all the commodities of the order are received.

- i. Un-submitted: When new order placed, it attains the status of un-submitted, here the order is in compilation stage and can be edited number of times, with those having authorization. The orders having this status are reflected in *Un-submitted* tab.
- ii. Reject: An order having status 'Un-submitted' can be rejected by concerned authority, by changing its status to 'Rejected' in 'Order status' dropdown in edit mode. When Rejected is selected from the drop down, a text box appears on screen, titled Reject Reason. User needs to fill the reason for rejection for further reference.
- iii. Submit: Once an order is placed, the user having relevant authority may edit it further or simply send it for submission. The orders submitted are listed in *Approve* tab.
- iv. Approve: The submitted order is then sent for approval to concerned authority, which may either process it further to Transmitted stage(i.e., sent to supplier), or cancel it altogether, in which condition the order gets reverted back to Un-submitted stage. The authority approving the order could also submit and approve the order together, if it has required rights.
- v. Change Order: Once the order is approved, it is transmitted through EDI process. The order having Transmitted status is reflected in Change order tab. Users with authorization may change order at this level.

Note: Once any quantity of the order is received, Change order cannot be implemented.

- vi. Receivable: The receivable status involves 3 sub status
 - a. Incomplete: This status indicates that the order has not been received.
 - b. Post Due: This status indicates that the order has been received after the specified Receive date.
 - c. Incomplete Post due: This status indicates that the order was partially received before Receive date, but some units are still undelivered after Receive date.

Note: Once it is approved, an order cannot be edited.

- vii. Closed: An order can be closed under two circumstances:
 - a. Auto close: The complete consignment is received and thus the order automatically closes.
 - b. Manual closure: The user due to certain circumstances explicitly chooses to close a certain order.

Under both circumstances, the order is deemed to completed, thus closed and such orders are listed under Closed tab.

This following manual guides the user to use the various functionalities of Order module.

Guidelines

a. Open Order

To open order, user may either select Order from Replenish dropdown or simply click the Order icon listed under Replenish on Dashboard.

The screenshot displays the eTurns OASIS 3.0 dashboard. The top navigation bar includes 'Reports', 'Dashboard', 'Administration', 'Inventory', 'Consume', 'Replenish', 'Asset', and 'Kits'. The 'Replenish' tab is active, showing a dropdown menu with options: 'Cart', 'Orders', 'Receive', and 'Transfer'. A red arrow points to the 'Orders' option. The dashboard layout includes sections for 'Kits' (Build/Break, VIP), 'Category Wise Cost' (a pie chart showing various categories like demo231123, Coupling, Outlets, Hammer, Keyboard, Ballasts, Conduit, Cables, Screw, Handy, Mouse, Test Category, Category 11, javascript:function(), {alert('hi')}, Lightinga, First Category, Circuit Breakers, AA, and Wire), 'Assets' (Asset Maintenance, Assets, Tools), 'Consume' (Project Spend, Pull, Requisitions, Work Orders), 'Authentication' (Roles, Rooms, User), and 'Configuration' (Email Configuration, Imports, Resources). The right sidebar contains 'Supporting Information' (Inventory Locations, Categories, Company, Customers, Enterprise, Freight Types, G/L Accounts, GXPR Consigned Jobs, Job Types, Locations, Manufacturers, Measurement Terms, Ship Vias, Suppliers, Technicians, Tool Categories, Units) and 'Inventory' (Count, Items, Material Staging, Quick List, Supplier Catalog). The 'Replenish' section at the bottom right shows icons for 'Cart', 'Orders' (highlighted with a red box and a red arrow), 'Receive', and 'Transfer'.

Copyright © 2013 eTurns.com. All rights reserved.

Figure 1

The following page appears on screen:

Copyright © 2013 eTurns.com. All rights reserved.

Figure 2

b. Place a New order:

To place a new order, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- A new order number is auto generated every time, but it is editable. Enter the particulars and hit "Save" button, the New Items grid then appears on screen, to add new items from table or catalog.

Stockroom: Room 1 Consume (2) → Requisitions (2) → Item (14) Language: English-US

Orders

Order Number * PO-1-9-041813-405 Supplier * Required Date * 04/25/2013 Order Status UnSubmitted

Comment

Release Number

Shipping Method

Staging Name

Customer

Pack Slip Number

Shipping Track Number

UDF1

UDF2 15

UDF3

UDF4

UDF5

Save Cancel

* Indicates required field(s).
☒ Check before the textbox or dropdowns if you want to save this value preserved when you visit this page next time.

Figure 3

Orders

Room : Room 1 Created On : 4/19/2013 5:25:25 PM Created By : Admin Updated On : 4/19/2013 5:25:25 PM Updated By : Admin

Order Number * PO-1-9-041913-421 Supplier * Supplier M Required Date * 04/26/2013 Order Status UnSubmitted

Save Cancel

Add New Item Add from Catalog

Search

Show 10 Records

ID	Item Number	Bin	Requested Quantity	Required Date	Received Quantity	Description	Unit	GL Account	Cost	Supplier	On Ord
No data available in table											

0 - 0 of 0

Figure 4

- The “Add New Item” button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click “Add”. The user may also enter various quantities together and then hit the “Add All” button at the bottom of the page. To close the selection, hit “Close”.

Figure 5

- Once the Close button is hit, only then the entries from the Add New Items grid are entered in the main New Items grid.
- If the user wishes to add items from the catalog, hit “Add from Catalog” button (either from the main page or Add New Items pop up), it opens another pop up. To select the item to be added from the catalog into the particular stock room, hit “Select” button in front of the item.

Figure 6

- A pop up describing the various particulars of the item is displayed. Enter the details and hit “Save” button.

Select Item from catalog

General Details

Item Number *

Manufacturer Details *

Manufacturer

Manufacturer Item #

Default Manufacturer ☐

ID	Name	Number	Default
110	MCNICO	ManufacturerPartNum	No

Supplier Details *

Supplier

Supplier Item #

Default Supplier ☐

ID	Name	Number	Default
2059	sfsdfsdfsdfsdf	SupplierPartNumber	No

Prices

Price Per UOM *

Cost *

Markup

Sell Price

Extended Cost

Average Usage

Quantity

On Hand Quantity

Critical Quantity *

Minimum Quantity *

Maximum Quantity *

Default Reorder Quantity *

Default Pull Quantity *

Staged Quantity

In Transit Quantity

On Order Quantity

On Transfer Quantity

Suggested Order Quantity

Requisitioned Quantity

Packing Quantity

Tracking

Serial # Tracking ☐

Lot # Tracking ☐

Expiration Date Tracking ☐

UDF(s)

UDF 1 *

UDF 2 *

UDF 3


UDF 4

Figure 7

c. Edit an existing order:

To edit an existing order in any module, click on the order number and new screen in accordance to the selected tab appears on screen. To edit any order the user must have the required authorization.

d. Delete an order:

An order can be deleted, by selecting the field and then click on Delete icon  or press Delete key on your keyboard. The user may also delete the selected or multiple fields. A pop up verifies your selection and then deletes the selected fields.

Orders

Search

Show 25 Records < 1 2 3 4 >

Go To Page: Go

Narrow Search By:

Supplier

Order Status

Required Date

User (Created by)

User (Updated by)

Date Created

From

To

Date Updated

From

To

UDF2

ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	Customer	Pack Slip Number	Shipping Track Number	Rejected Reason
133	PO-1-9-041913-416	456213	via ship	Supplier M	Warehouse		4/26/2013 12:00:00 AM	UnSubmitted	Test Customer	89798	256	
132	PO-1-9-041913-414			testone			4/26/2013 12:00:00 AM	UnSubmitted				
131	PO-1-9-041913-413			testone			4/26/2013 12:00:00 AM	UnSubmitted				
130	PO-1-9-041813-409			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
129	PO-1-9-041813-408	456	via ship	Supplier M	STAGING A1		4/25/2013 12:00:00 AM	Submitted	Jason	54654	56465	
128	PO-1-9-041813-407	15465	Order SPV	Supplier M	s1		4/25/2013 12:00:00 AM	UnSubmitted	Jason			
127	PO-1-9-041813-406			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
125	PO-1-9-041813-403			sehil			4/25/2013	UnSubmitted				

Figure 8

Note: The order having status Transmitted cannot be deleted.

e. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.

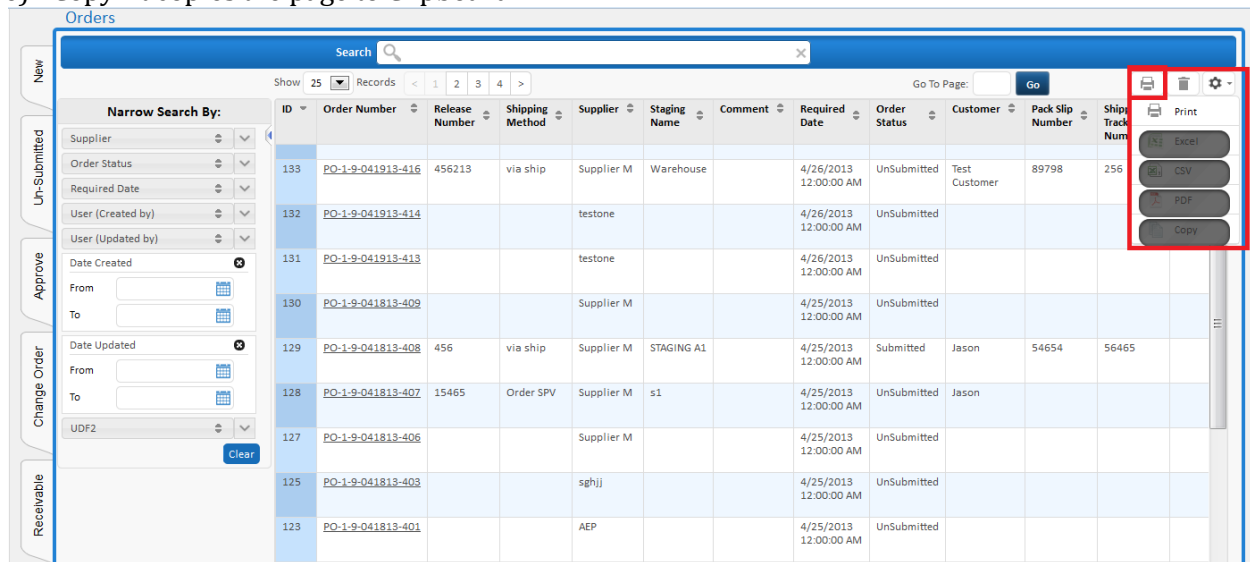


Figure 9

f. View change log for an order:

To view the updated history of an order, select the order and click on change log tab. It displays when the order was created and the number of times it was updated.

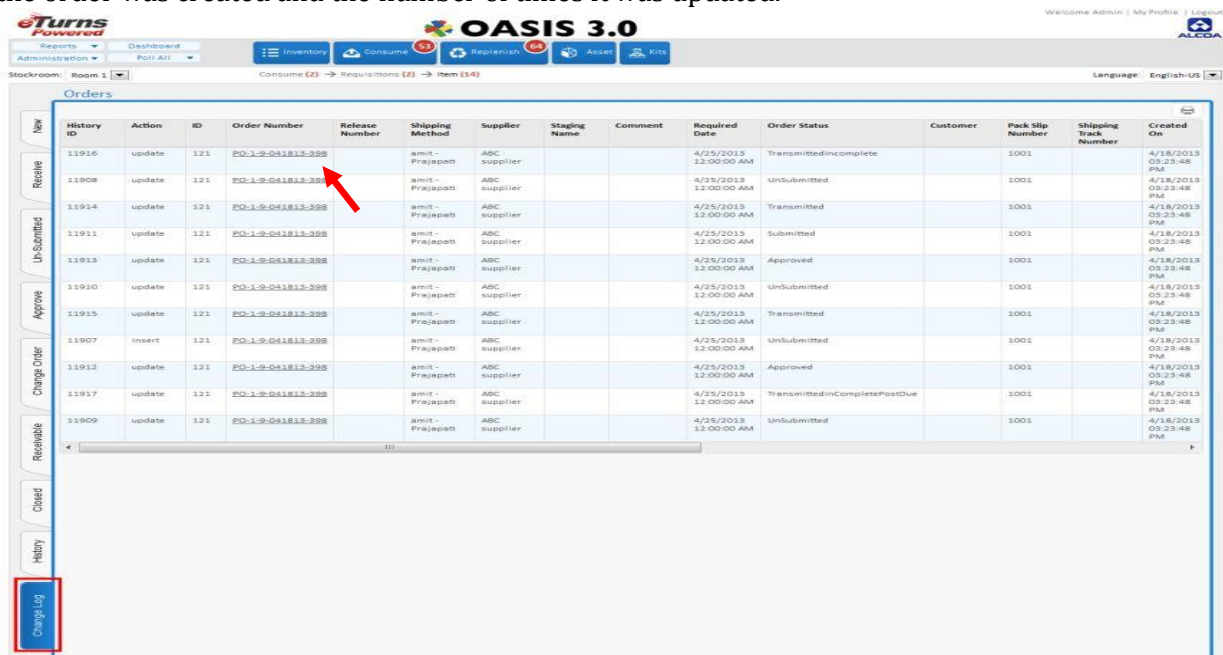
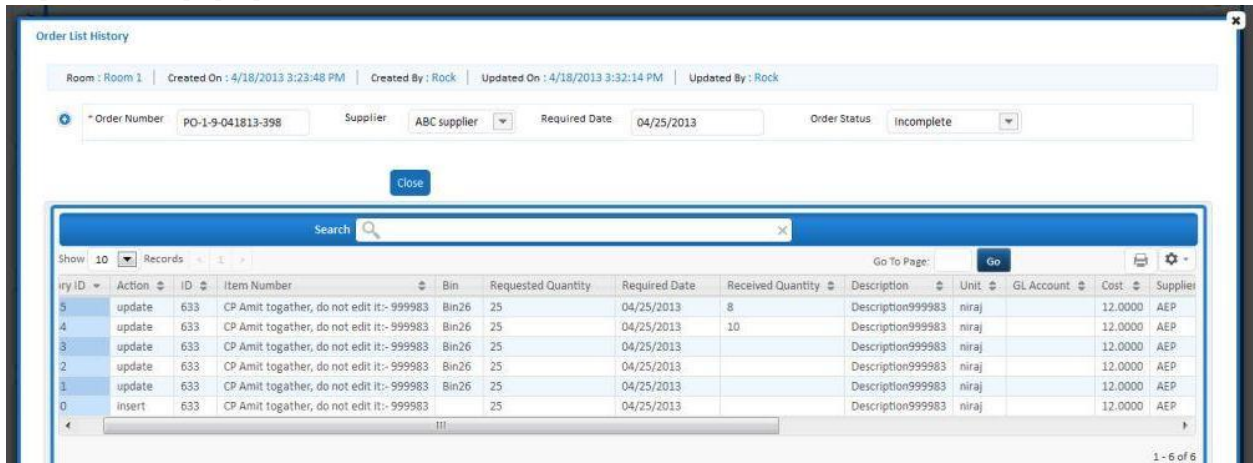


Figure 10

To view the log for individual items of the order, click on order number and items change log is displayed in a pop up.



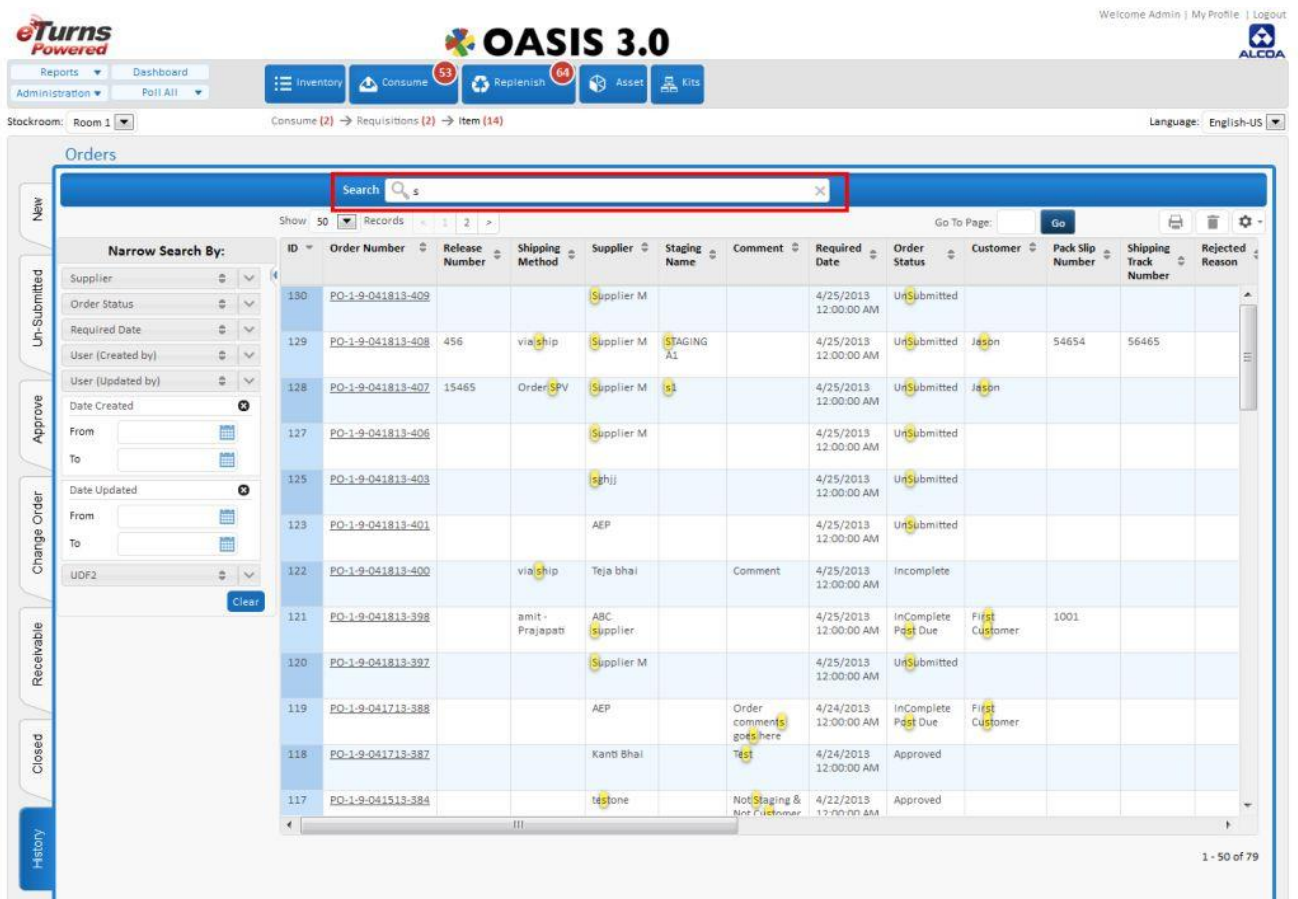
Item ID	Action	ID	Item Number	Bin	Requested Quantity	Required Date	Received Quantity	Description	Unit	GL Account	Cost	Supplier
5	update	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013	8	Description999983	niraj		12.0000	AEP
4	update	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013	10	Description999983	niraj		12.0000	AEP
3	update	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013		Description999983	niraj		12.0000	AEP
2	update	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013		Description999983	niraj		12.0000	AEP
1	update	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013		Description999983	niraj		12.0000	AEP
0	insert	633	CP Amit together, do not edit it:- 999983	Bin26	25	04/25/2013		Description999983	niraj		12.0000	AEP

Figure 11

g. Search the Order for keyword:

There are two types of search available to look for any keyword or filter the content of the module:


- Main Search:** To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

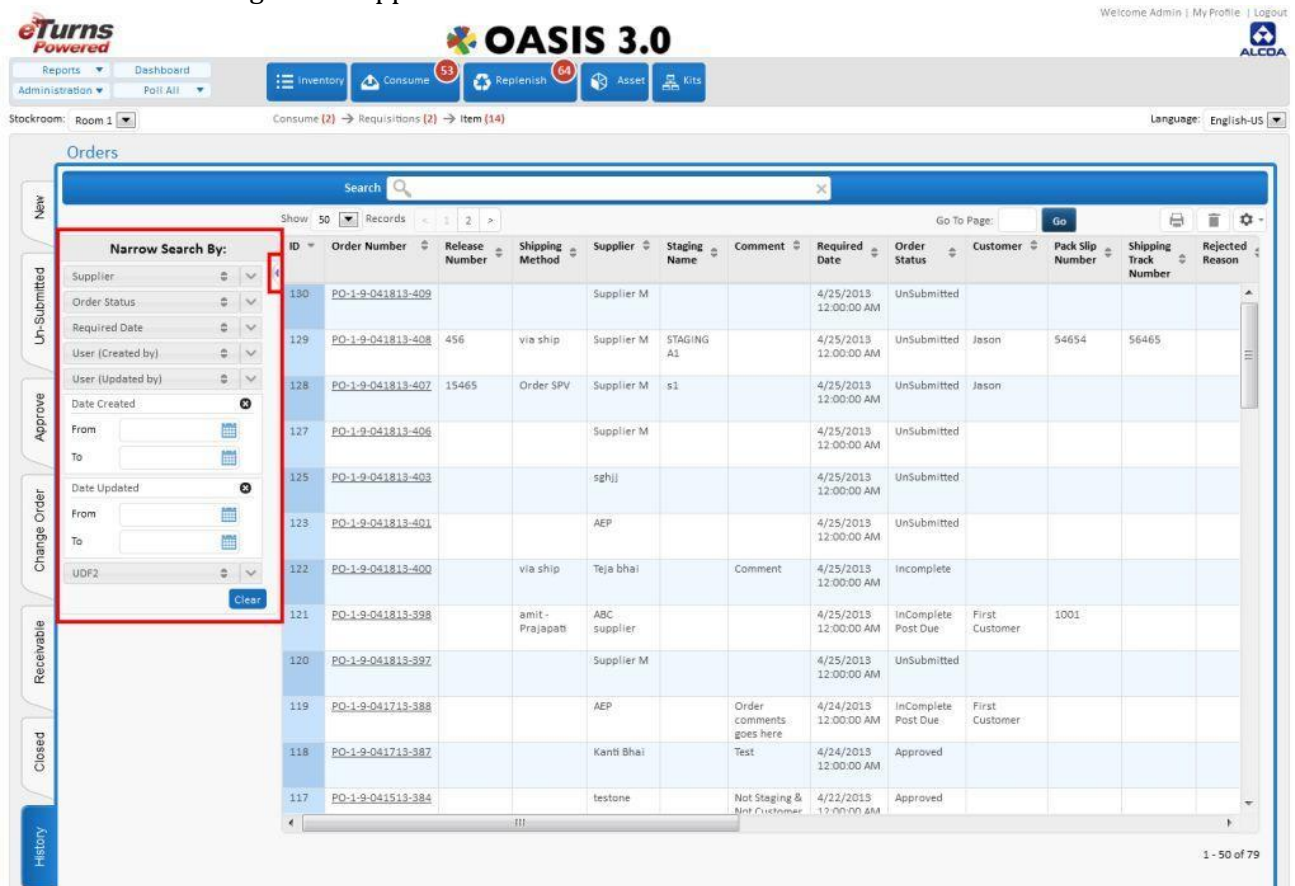


ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	Customer	Pack Slip Number	Shipping Track Number	Rejected Reason
130	PO-1-9-041813-409			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
129	PO-1-9-041813-408	456	via ship	Supplier M	STAGING A1		4/25/2013 12:00:00 AM	UnSubmitted	Jason	54654	56465	
128	PO-1-9-041813-407	15465	Order SPV	Supplier M	15		4/25/2013 12:00:00 AM	UnSubmitted	Jason			
127	PO-1-9-041813-406			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
125	PO-1-9-041813-403			ghij			4/25/2013 12:00:00 AM	UnSubmitted				
123	PO-1-9-041813-401			AEP			4/25/2013 12:00:00 AM	UnSubmitted				
122	PO-1-9-041813-400		via ship	Teja bhai		Comment	4/25/2013 12:00:00 AM	Incomplete				
121	PO-1-9-041813-398		amit - Prajapati	ABC Supplier			4/25/2013 12:00:00 AM	InComplete Post Due	First Customer	1001		
120	PO-1-9-041813-397			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
119	PO-1-9-041713-388			AEP		Order comments goes here	4/24/2013 12:00:00 AM	InComplete Post Due	First Customer			
118	PO-1-9-041713-387			Kanti Bhai		Test	4/24/2013 12:00:00 AM	Approved				
117	PO-1-9-041513-384			testone		Not Staging & Not Customer	4/22/2013 12:00:00 AM	Approved				

Figure 12

ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

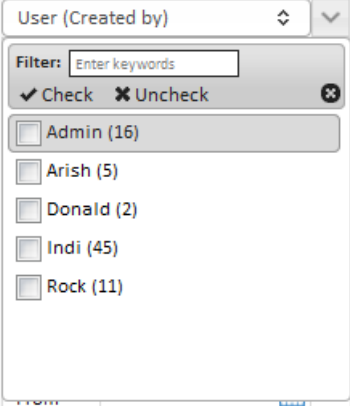
- To open Narrow search, click on the small Triangular icon  on the top left corner of the screen.
- The following screen appears:

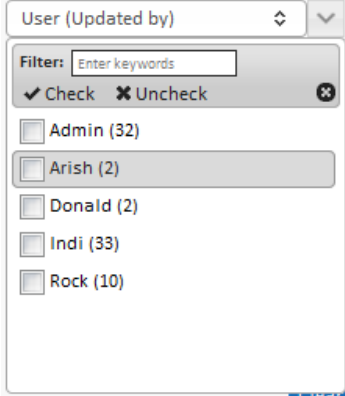

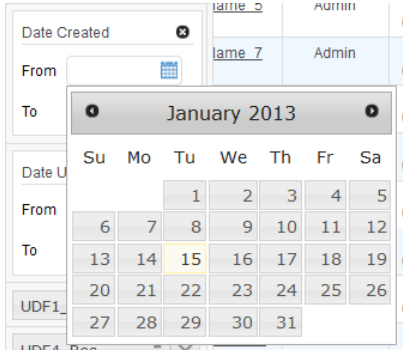

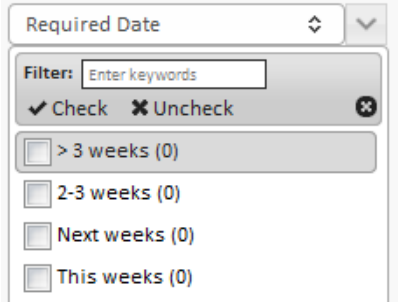


The screenshot shows the OASIS 3.0 interface. The top navigation bar includes 'Reports', 'Dashboard', 'Administration', and 'Poll: All'. The main header shows 'Stockroom: Room 1', 'Consume (2)', 'Requisitions (2)', and 'Item (14)'. The 'Orders' module is active, displaying a sidebar with 'Narrow Search By:' and a table of orders. The sidebar includes filters for Supplier, Order Status, Required Date, User (Created by), User (Updated by), Date Created, Date Updated, and UDF2. The table lists orders with columns: ID, Order Number, Release Number, Shipping Method, Supplier, Staging Name, Comment, Required Date, Order Status, Customer, Pack Slip Number, Shipping Track Number, and Rejected Reason.

ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	Customer	Pack Slip Number	Shipping Track Number	Rejected Reason
130	PO-1-9-041813-409			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
129	PO-1-9-041813-408	456	via ship	Supplier M	STAGING A1		4/25/2013 12:00:00 AM	UnSubmitted	Jason	54654	56465	
128	PO-1-9-041813-407	15465	Order SPV	Supplier M	s1		4/25/2013 12:00:00 AM	UnSubmitted	Jason			
127	PO-1-9-041813-406			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
125	PO-1-9-041813-403			sgjij			4/25/2013 12:00:00 AM	UnSubmitted				
123	PO-1-9-041813-401			AEP			4/25/2013 12:00:00 AM	UnSubmitted				
122	PO-1-9-041813-400		via ship	Teja bhai		Comment	4/25/2013 12:00:00 AM	Incomplete				
121	PO-1-9-041813-398			amit - Prajapati	ABC supplier		4/25/2013 12:00:00 AM	InComplete Post Due	First Customer	1001		
120	PO-1-9-041813-397			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted				
119	PO-1-9-041713-388			AEP		Order comments goes here	4/24/2013 12:00:00 AM	InComplete Post Due	First Customer			
118	PO-1-9-041713-387			Kanti Bhai		Test	4/24/2013 12:00:00 AM	Approved				
117	PO-1-9-041513-384			testone		Not Staging & Int Customer	4/22/2013 12:00:00 AM	Approved				

Figure 13

Field	Description
User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>

User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made.</p> <p>Note: To cancel the selections made at any point of time, click .</p>
Date Created and Date Updated	<p>They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.</p>  <p>Note: To clear the entire selection, click .</p>
Required Date	<p>It is used to filter the module for order palced in certain time frame. Check or uncheck the filter user wishes to place on the entites of the module.</p> 

Note: At point of time only one of the either searches will work.

h. View records and go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click “Go”.

Figure 14

i. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- Refresh:** This option refreshes the module and displays the latest changes implemented.
- Auto Refresh:** This option automatically refreshes the screen in specified time.
- Only Deleted:** This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- Only Archived:** This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- Reorder:** This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.
 - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
 - User may also drag and drop fields to be arranged in order of choice.
 - After the selection is completed, click “Reorder”.

Orders

Search

Show 25 Records 1 2 3 4 >

Go To Page: Go

Narrow Search By:

Supplier

Order Status

Required Date

User (Created by)

User (Updated by)

Date Created

From

To

Date Updated

From

To

UDF2

Clear

ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	Customer	Pack Slip Number
133	PO-1-9-041913-416	456213	via ship	Supplier M	Warehouse		4/26/2013 12:00:00 AM	UnSubmitted	Test Customer	89798
132	PO-1-9-041913-414			testone			4/26/2013 12:00:00 AM	UnSubmitted		
131	PO-1-9-041913-413			testone			4/26/2013 12:00:00 AM	UnSubmitted		
130	PO-1-9-041813-409			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted		
129	PO-1-9-041813-408	496	via ship	Supplier M	STAGING A1		4/25/2013 12:00:00 AM	Submitted	Jason	54654 56465
128	PO-1-9-041813-407	19465	Order SPV	Supplier M	s1		4/25/2013 12:00:00 AM	UnSubmitted	Jason	
127	PO-1-9-041813-406			Supplier M			4/25/2013 12:00:00 AM	UnSubmitted		
125	PO-1-9-041813-403			sgbjj			4/25/2013 12:00:00 AM	UnSubmitted		
123	PO-1-9-041813-401			AEP			4/25/2013 12:00:00 AM	UnSubmitted		
122	PO-1-9-041813-400		via ship	Teja bhaj	Comment		4/25/2013 12:00:00 AM	Incomplete		
121	PO-1-9-041813-398			amit - Prajapati	ABC supplier		4/25/2013 12:00:00 AM	Incomplete	First Customer	1001

Refresh

Auto Refresh

Only Deleted

Only Archived

Reorder

UDF Setup

A+ A A-

Figure 15

j. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row