



eTurns

Orders

Help documentation



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The Orders module is used to replenish the inventory to prevent stockouts and maximize service levels. Orders can be processed based on the permission(s) level of the user, in an unsubmitted, submitted, or approved state.

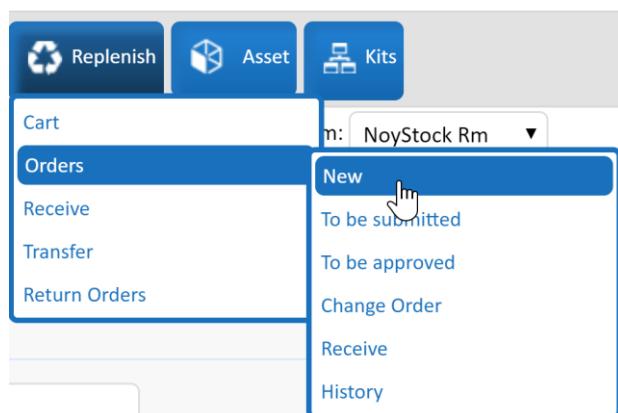
Guidelines

1. Quick Reference Guide – Create a New Order

To create a new order, point the mouse over Replenish, Orders and click on New.

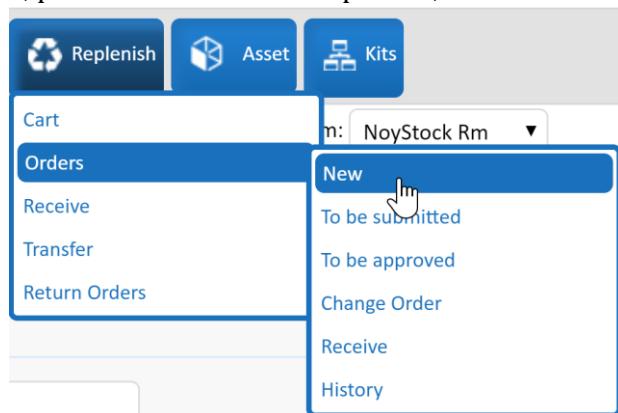
- Click Save (retaining all default selections).
- Search for item(s) or highlight row(s) of item(s) to add to the order.
- Click the Add button for each line item or the Add button at the bottom of the page.
- Click Close.
- Click the Order Status drop-down arrow and choose Approved.
- Click Save.
- Click Yes.

A new Order has been created and ready to be received.



2. Create a New Order – with General Details

To create a new order, point the mouse over Replenish, Orders and click on New.





The Orders Header page is displayed:

The screenshot shows the 'Orders' header page. At the top, there are dropdown menus for 'Supplier' (set to 'Henry Schein'), 'Order Number' (set to 'PO123'), 'Required Date' (set to '11/19/2020'), and 'Order Status' (set to 'Unsubmitted'). On the left, a vertical sidebar lists 'New' (highlighted in red), 'To be submitted', and 'To be approved'. The main area contains fields for 'Comment', 'Release Number' (set to '1'), 'Shipping Tracking #', 'Shipping Vendor', 'Shipping Method', 'Staging Name', and 'Customer'. To the right, there are fields for 'Pack Slip Number', 'Drop ship address' (set to '1 name'), and 'Order Header UDF'. A note at the bottom says 'Check the textbox or dropdowns if you want to have this value preserved when you visit this page next time.' Buttons for 'Save' and 'Cancel' are at the bottom.

- The default supplier from the room setting is displayed. Choose a different supplier by clicking on the drop-down arrow. Orders will be sent to the supplier selected.

The screenshot shows the 'Orders' header page with the 'Supplier' dropdown open. The dropdown menu lists several suppliers: '3333-PH-Fisher', '3334-BIO-Fisher', '3363-CL-Fisher', '3364-CH-Fisher', 'BIO-VWR', and 'Graybar'. The 'Supplier' field in the header is set to 'Henry Schein'. The 'OrderlineItem' section at the bottom has a red box around 'Henry Schein'.

- In contrast to the Cart Module, that separates items into orders by supplier, the Orders module will send the orders to the supplier selected. It disregards the default supplier set in the item(s) page and allows the user to select the supplier to order from.
- Order Number – is the identifier of the Order.
- Required Date – is setup in the Supplier's page *Default Order Required Days*.
 - It is the lead time in number of days to receive the order from the Supplier.
- Order Status – initially starts as unsubmitted, but after adding items the order status can be selected.
 - Unsubmitted – order created but not submitted to the supplier (order will not be sent to supplier).
 - Submitted – order submitted but not approved (order waiting on approval).
 - Approved – order has been approved (order will be sent to the supplier).
 - Closed – order has been closed. An unsubmitted or Submitted order can be closed.

The screenshot shows the 'Order Status' dropdown menu. The menu items are 'Unsubmitted' (highlighted in blue), 'Submitted', 'Approved', and 'Closed'. A red box with a cursor icon is over the 'Unsubmitted' option.



- Comment – text field that can be used to describe the order.
- Release Number – unique identifier assigned by the software to distinguish between orders regardless of order number or order name.
- Shipping Tracking # - transmitted through EDI (if supplier is integrated) with a shipping tracking number.
- Shipping Vendor – transmitted through EDI (if supplier is integrated) with a shipping vendor name.
- Shipping Method – choose how the supplier will ship the items (if applicable).
- Staging Name – creates a staging, wherein items received will be staged.
- Customer – customer pertaining to the order. Add New option is available to create a new customer.
- Pack Slip Number - transmitted through EDI (if supplier is integrated) with a pack slip number.
- Drop ship Address – this data is linked to a Supplier. Select a drop ship address if applicable.
- UDF – user defined field for orders.
- Click “Save” button.

Comment	<input type="text"/>	Pack Slip Number	<input type="text"/>
Release Number	<input type="text" value="27"/>	Drop ship address	<input type="text" value="1 name"/> <input type="button" value="▼"/>
Shipping Tracking #	<input type="text"/>	Order Header UDF	<input type="text"/>
Shipping Vendor	<input type="text"/>		
Shipping Method	<input type="text" value="USPS"/>		
Staging Name	<input type="text"/>		
Customer	<input type="text" value="Customer 1"/>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Note: There is an option to preserve the values entered the next time the user visits the page. Checkbox option at the header of the new order page.

Check the textbox or dropdowns if you want to have this value preserved when you visit this page next time.



The “Add new item(s) to Order” page will be displayed, after clicking Save in the Orders Header page.

Add new item(s) to Order

Add New Item Add from Catalog

#	Add new	Item Number	Qty	Bin List	OrderDetails Order Details UDF in row	One	Two	On Hand Quantity	Last Cost
1		01-213-104	10	WHMain	C1S3P1 P9.CY.R1.S3.B5 WHMain More Locations	1	2	391	20.
2		06-666-1A	15					146	50.

- Select the items to order and click the add button to accept the displayed quantity and bin location.
 - The Qty column displays the default reorder quantity of the item.
 - On the item page, if the default reorder quantity is enforced, the item can only be ordered in multiples of the default reorder quantity.
 - The bin List column is the default bin location of the item.
 - Enter or select the UDF fields if applicable.
- Select the items to Order individually and click the add button or highlight row(s) of items and click the Add Button at the bottom of the page to add multiple items at one time.

9		1.00	1234	WHMain	0.00	NoyStock Rm	2/14/2019 8:31:42 AM	11/18/2020 12:03:29 PM
10		10.00	14-387- 192	WHMain	0.00	NoyStock Rm	9/14/2018 11:47:43 AM	11/18/2020 2:18:04 PM

Denotes on hand quantity of item is less than critical quantity

Denotes on hand quantity of item is less than minimum quantity

Search or narrow search for items to be ordered.

- The items to be ordered can be filtered by the Narrow Search or Search options.

Narrow Search By:

Supplier

Manufacturer

Category

Cost:

Stock Status:

Average Usage:

Turns:

Item Type

User (Created by)

User (Updated by)

Date Created
 ✖

From
To

Date Updated
 ✖

From
To

Search

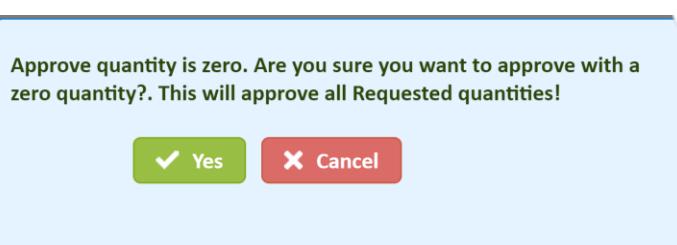
- a. Supplier: Filter items to be ordered by supplier. Check/uncheck the box corresponding to the name of supplier. This will display the items to be ordered, filtered by supplier(s).
- b. Manufacturer: Filter items to be ordered by manufacturer. Check/uncheck the box corresponding to the name of manufacturer. This will display the items to be ordered, filtered by manufacturer(s).
- c. Category: Filter items to be ordered by category. Check/uncheck the box corresponding to the name of the category. This will display the items to be ordered, filtered by categories.
- d. Cost: Filter items to be ordered based on a range of cost.
- e. Stock Status: Filter items to be ordered based on their current stock status, whether Out of Stock, Below Critical, Below Minimum or Above Maximum.
- f. Turns: Filter items to be ordered based on a range of the number of turns.
- g. Item Type: Filter items to be ordered by Item type, Item, Quick list, Kit or Labor.
- h. User (Created By): Filter items to be ordered by user created by.
- i. User (Updated By): Filter items to be ordered by user updated by.
- j. Date Created: Filter items to be ordered by Date Created from and to range.
- k. Date Updated: Filter items to be ordered by Date Updated from and to range.



- After selecting the items to order, click on the **Close** button at the bottom of the *Add New Item(s) to Order* page.
- The Orders page will be displayed with the number of line items ordered and the total sell price.
 - Total Sell Price is the sell price of all items ordered.
- Order Status – choose from the following order status:
 - Unsubmitted – order created but not submitted to the supplier (order will not be sent to supplier).
 - Submitted – order submitted but not approved (order waiting on approval).
 - Approved – order has been approved (order ready to be sent to supplier).
 - Closed – order has been closed. An unsubmitted or Submitted order can be closed.
- Click Save.

The screenshot shows the 'Orders' page. On the left, there is a vertical navigation bar with tabs: 'Edit' (selected), 'To be submitted', 'To be approved', and 'Change Order'. The main area displays a form for creating a new order. The 'Supplier' field is set to 'BIO-VWR'. The 'Order Number' field contains '7/18/2019-13'. The 'Required Date' field is set to '7/23/2019'. A dropdown menu for 'Order Status' is open, showing five options: 'Approved' (selected), 'Unsubmitted', 'Submitted', 'Approved', and 'Closed'. A red box highlights the status dropdown. Below the form, a message states 'No of line items : 4 | Total Sell Price : \$ 1,017.360'. At the bottom, there is a table with two rows of data, and a search bar above it.

- Clicking Yes will populate the approved quantity with the requested quantity.



Orders will be sent to suppliers integrated through EDI. For non-integrated suppliers, a scheduled report called Order to Supplier can be setup. Navigate to Reports, then click on Schedule Report(s).

3. Open Existing Orders

To open the Orders module, point the mouse over Replenish and click on Orders. This opens the Order History Tab, or the historical data of the Orders.

The screenshot shows the eTurns Order History page. A context menu is open over an order row. The menu items are: New, To be submitted, To be approved, Change Order, Receive, and History. The 'History' option is highlighted with a blue border. The main grid displays several orders with columns for Order Number, Required Date, Order Status, # of Line Items, and Cost.

#	Expand	ID	Order Number
1		33992	5/16/2019-22

To open an existing Order, click on the Order Number hyperlink.

- The details page of the Order will be displayed.
- Click on the plus icon to open the header details.

The screenshot shows the Order Details page for Order Number 5/16/2019-22. The header section includes fields for Supplier (Westburne), Order Number (7/16/2019-92), Required Date (7/16/2019), and Order Status (Closed). A red arrow points to the 'Supplier' field. Below the header is a summary line: 'No of line items : 2 | Total Sell Price : \$ 791.500'. The main grid displays two line items with columns for ID, Staged Quantity, Maximum Quantity, Item Number, Bin, Approved quantity, Received quantity, Supplier, Received On Date, On Order Quantity, Sell Price, GL Account, Last Cost, and Mark up.



The header details page is displayed.

- Supplier – name of the supplier when the order was created.
- Order Number – identifier of the Order.
- Required Date – is setup on the Supplier's page *Default Order Required Days*.
 - It is the lead time in number of days to receive the order from the Supplier.

Orders

Room : NoyStock Rm | Created On Date : 7/16/2019 9:43:18 AM | Created By : noy production | Updated On Date : 7/16/2019 9:43:43 AM | Updated By : noy produc

Supplier * WESTBURNE Order Number * 7/16/2019-92 Required Date * 7/16/2019
Order Status Closed

Comment
Release Number 1 Pack Slip Number
Shipping Tracking #
Shipping Vendor
Shipping Method
Staging Name
Customer

Pack Slip Number
Drop ship address 1 b
Order Header UDF

Edit Order Line Items Unclose Order Cancel

No of line items : 2 | Total Sell Price : \$ 791.500

Order Status To be submitted To be approved

- To setup Required Date or *Default Order Required Days*, go to the Supplier's page.
 - Point your mouse over Administration, Supporting Information and click on Suppliers.
 - The Default Order Required Days is the lead time Required Date on the Order page.

Suppliers

Room : NoyStock Rm | Created On Date : 11/6/2018 11:01:28 AM | Created By

General Details

Supplier Name * WESTBURNE
Supplier Color * #d99694
Description
Branch Number
Maximum Order Size
Default Order Required Days 5



- Order Status
 - Unsubmitted – order created but not submitted to the supplier (order will not be sent to supplier).
 - Submitted – order submitted but not approved (order waiting on approval).
 - Approved – order has been approved (order ready to be sent to supplier).
 - Closed – order has been closed. An unsubmitted or Submitted order can be closed.

The screenshot shows the 'Orders' screen in the eTurns application. At the top, there are fields for Room (NoyStock Rm), Created On Date (6/17/2019 10:22:25 AM), Created By (noy production), Updated On Date (6/17/2019 10:23:22 AM), and Updated By (noy production). Below these are fields for Supplier (BIO-VWR), Order Number (6/17/2019-52), Required Date (6/17/2019), and Order Status (Unsubmitted). A dropdown menu for Order Status is open, showing options: Unsubmitted (selected), Submitted, Approved, and Closed. The 'Edit' button is highlighted in blue. On the left, a vertical sidebar shows status indicators: 'To be submitted' (1), 'To be approved' (0), and 'e Order' (0). At the bottom, it says 'No of line items : 3' and 'Total Sell Price : \$ 9.360'.

- Comment – text field that can describe the order.
- Release Number – unique identifier assigned by the software to distinguish between orders regardless of name.
- Shipping Tracking # - transmitted through EDI (if supplier is integrated) with a shipping tracking number.
- Shipping Vendor – transmitted through EDI (if supplier is integrated) with a shipping vendor name.
- Shipping Method – choose how the supplier will ship the items (if applicable).
- Staging Name – creates a staging, wherein items received will be staged.
- Customer – customer pertaining to the order. Add New option is available to create a new customer.
- Pack Slip Number - transmitted through EDI (if supplier is integrated) with a pack slip number.
- Drop ship Address – this data is linked to a Supplier. Select a drop ship address if applicable.
- UDF – user defined field for orders.

The screenshot shows the 'Orders' screen in the eTurns application. At the top, there are fields for Room (NoyStock Rm), Created On Date (7/16/2019 9:43:18 AM), Created By (noy production), Updated On Date (7/16/2019 9:43:43 AM), and Updated By (noy production). Below these are fields for Supplier (WESTBURNE), Order Number (7/16/2019-92), Required Date (7/16/2019), and Order Status (Closed). To the right, there are sections for Comment, Release Number (1), Shipping Tracking #, Shipping Vendor, Shipping Method, Staging Name, Customer, Pack Slip Number, Drop ship address (1 b), and Order Header UDF. On the left, a vertical sidebar shows status indicators: 'To be submitted' (1), 'To be approved' (0), and 'e Order' (0). At the bottom, it says 'No of line items : 2' and 'Total Sell Price : \$ 791.500'.

Note: To Edit an existing Order, please refer to Sections 4, 5, 6 and 7.



Viewing an existing Order with a collapsed or closed header:

- Add New Item – a new item can be added to an order with an order status that is not closed.
- Add from Catalog – add items from an electronic catalog provided by the supplier.
- Search – type keywords in the search field to view existing items in an order.
- No. of line items – displays a count of the number of items in the order.
- Total Sell Price – total of the sell price column, which is the sell price of all items ordered.
- Item(s) ordered are displayed in the grid.

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Received quantity	On Hand Quantity	Staged Quantity	Description	Unit	GL Acc
1		01-213-104	WHMain	10.00	0.00	11/19/2020	0.00	362.00	3.00	25ft Aluminum Foil 4	EA	817
2		06-666-1A	Noy-WHMain	15	0	11/19/2020	0.00	343.00	4.00	Large Kimwipes	PK	817
3		1001570	WHMain	200	0	11/19/2020	0.00	3117.00	0.00	Sponge Gauze All-Gauze Cotton/Woven 2x2" 12 Ply NS LF 200/Bg, 40 BG/CA	BG	817

4. Order Status

When a new Order is created, the Order Status starts off in an Unsubmitted state.

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Received quantity	On Hand Quantity	Staged Quantity	Description	Unit	GL Acc
1		01-213-104	WHMain	10.00	0.00	11/19/2020	0.00	362.00	3.00	25ft Aluminum Foil 4	EA	817
2		06-666-1A	Noy-WHMain	15	0	11/19/2020	0.00	343.00	4.00	Large Kimwipes	PK	817
3		1001570	WHMain	200	0	11/19/2020	0.00	3117.00	0.00	Sponge Gauze All-Gauze Cotton/Woven 2x2" 12 Ply NS LF 200/Bg, 40 BG/CA	BG	817

a. To Be Submitted tab.

- The *To Be Submitted Tab* contains Orders in an Unsubmitted Order Status “U”.
- The Red Circled Number indicates the number of Orders that are in an Unsubmitted status.
 - Unsubmitted – order created but not submitted (order will not be sent to the supplier).
- Orders in the Unsubmitted status need to be Submitted or Approved for the order to be processed.
- Click on the Order Number (hyperlink).

Search																		
Show 50 Records < 1 > Go To Page: <input type="button" value="Go"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Change Order"/>																		
Narrow Search By:		#	Expand	ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	# of Line Items	Cost	Customer	Pack Slip Number	Shipping Tracking #	Chg Ord Rev
Supplier		1		34161	2019-06-19-1	2		3333-PH-Fisher			6/19/2019	U	4	2042.200				
Order Status		2		34160	2019-06-19-1	1		3333-PH-Fisher			6/19/2019	U	3	819.200				
Required Date		3		34157	6/18/2019-64	1		BIO-VWR			6/23/2019	U	0	0.000				
Shipping Vendor		4		34154	6/18/2019-61	1		BIO-VWR			6/23/2019	U	3	1043.920				
User (Created by)		5		34153	6/18/2019-60	1		BIO-VWR			6/23/2019	U	0	0.000				
User (Updated by)		6		34150	6/17/2019-58	1		BIO-VWR			6/17/2019	U	0	0.000				
Date Created		7		34149	6/17/2019-57	1		BIO-VWR			6/17/2019	U	0	0.000				
From		8		34148	6/17/2019-56	1		BIO-VWR			6/17/2019	U	0	0.000				

- The Orders detail page will be displayed.
- Click on the Order Status drop-down arrow and choose Submitted.

Search																		
Show 10 Records < 1 > Go To Page: <input type="button" value="Go"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Change Order"/>																		
#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Received quantity	On Hand Quantity	Staged Quantity	Description	Unit	GL Account	Last Cost	Mark up	Sell Price	Supplier	On Order Quantity	On Return Quantity
1	1156308	WMain	<input type="button" value="▼"/>	8	0	6/17/2019	0	5	0	Recording Paper ECG/EKG 8Pk/Ca	EA		87.420	0	87.420	Henry Schein	16	
2	53300-421	WMain	<input type="button" value="▼"/>	4	0	6/17/2019	0	8	0	5mL Serological Pipettes, Falcon (50/pk)	PK		30.640	0	30.640	BIO-VWR	24	
3	01-213-104	WMain	<input type="button" value="▼"/>	10	0	6/17/2019	0	299	10	25ft Aluminum Foil	EA		20.480	0	20.480	3364-CH-Fisher	40	

- If user permission settings do not have the authority to *Allow an order to be Approved*, the order will go to the To Be Approved status.



- If the user permission settings have authority to *Allow an order to be Approve*, the Order will go to the Approved status.
- To set User permissions settings, point the mouse over **Administration, Authentication** and click on **Users**.

The screenshot shows the eTurns application interface. At the top, there is a navigation bar with links for 'Reports', 'Dashboard', 'Administration', 'Poll All', 'Inventory', 'Consume', and a search bar. A dropdown menu under 'Administration' is open, showing options like 'Authentication', 'Site Configuration', 'Supporting Information', 'BillOfMaterial', 'Edit', and 'User Details'. The 'User Details' section is highlighted with a blue border. Inside this section, there is a user profile for 'Noy Testing' with details: 'any', 'Created', '2018 12:18:00 PM', and 'Created'. Below the user profile, there are two buttons: 'List' and 'Add new'. A cursor is hovering over the 'Permission Template' link.

- Click on the Admin Permissions tab.
- Scroll down to the Order section.
- Select the appropriate permissions.

The screenshot shows the 'Order' section of the Admin Permissions page. It contains several checkboxes for different permissions:

- Allow an order to be Approved
- Allow an order to be submitted
- AllowAnOrderToBeUnapprove
- AllowAnOrderToBeUnclose
- Allow Change Orders
- PreventTransmittedOrdersFromDisplayingInRedCount

a. To Be Approved tab.

- If an Order is in the To Be Approved tab, a user with *Allow an order to be Approved* permission needs to approve the Order.
- Click on the To be Approved tab.
- Click on the Order Number (hyperlink).

The screenshot shows the 'Orders' screen. On the left, there is a sidebar with filters for 'Supplier', 'Order Status', 'Required Date', 'Shipping Vendor', 'User (Created by)', 'User (Updated by)', 'Date Created', 'From' (date range), 'To' (date range), 'Date Updated', and 'From' (date range). A red box highlights the 'To be approved' filter. In the center, there is a table of orders. One specific order is highlighted with a red box around its ID '34164'. The table columns include: #, Expand, ID, Order Number, Release Number, Shipping Method, Supplier, Staging Name, Comment, Required Date, Order Status, # of Line Items, and Cost. At the bottom of the table, there is a note: 'U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed'. A red box also highlights the 'Order Number' column header.

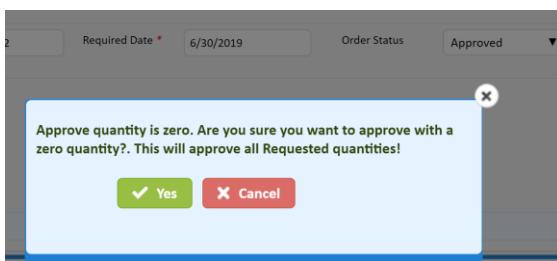


The Order details page will be displayed.

- Under Order Status, click on the drop-down arrow and choose Approved.
- Save.
- The Order has now been Approved and will be processed, and will be ready to received.

The screenshot shows the 'Orders' page in eTurns. At the top, there are filter fields for Supplier (BIO-VWR), Order Number (6/19/2019-69), and Required Date (6/24/2019). Below these is a dropdown menu for 'Order Status' with options: Submitted, Approved (highlighted with a red box), and Closed. A 'Save' button is highlighted with a red box. On the left sidebar, there are several status indicators: 'Edit' (1), 'To be submitted' (2), 'To be approved' (1), 'Change Order' (3), and 'Receive' (9). The main content area displays a grid of order items. One item is shown in detail: ID 56482, Item Number 53300-421, Bin WHMain, Requested quantity 4, Approved quantity 0, Received quantity 0, On Hand Quantity 8, Staged Quantity 0, Description 5mL Serological Pipettes, Falcon (50/pk), Unit PK, GL Account 30.640, Last Cost 0, Mark up 30.640, Sell Price BIO-VWR, Supplier 24. A message at the bottom left says 'No of line items : 1 Total Sell Price : \$ 122.560'. A search bar is at the top of the grid. The bottom right of the grid shows '1 - 1 of 1'.

- Clicking Yes will populate the approved quantity with the requested quantity.



Set dollar limits and quantity of items to order for users who have approve permissions.

- To set dollar limits for users who have approve order permissions and limit the quantity of items to order, point the mouse over to Administration, Authentication and click on Users.

The screenshot shows the 'Administration' menu in eTurns. Under 'Authentication', 'Users' is selected and highlighted with a blue box. A sub-menu for 'Users' shows 'List' and 'Add new' buttons. Other options like 'Site Configuration', 'Supporting Information', and 'BillOfMaterial' are also listed under 'Authentication'. The top navigation bar includes 'Reports', 'Dashboard', 'Inventory', 'Consume', and 'Replenish'.



- In the users Default Settings tab set the limitations.
- No Limit – orders will not be limited.

Save Cancel

Support Tables Permissions Module Permissions Admin Permissions Default Settings

Order Approval Dollar Limit Set Limit No Limit

Supplier Filter Supplier

- Set Limit – orders will be limited with the settings selected.
- Limits can be set per occurrence:
 - Days, Weeks, Months and Years.
 - Per Order or for All Orders.
 - Set the dollar limit.
 - The software will keep track of the dollar amount used against the dollar limit.
 - Set the limit of the quantities of the items that can be ordered.
 - Select the Supplier(s) that the limit applies to.
- Click Save.

Save Cancel

Support Tables Permissions Module Permissions Admin Permissions Default Settings

Order Approval Dollar Limit Set Limit No Limit

Every : 1 Weeks Per Order Dollar Limit 100000

Dollar Used 0 Item Order Quantity Limit 0

Supplier Filter Supplier

b. Change Order tab.

- Approved Orders that have not yet been received are in the Change Order tab.
- Conceptually the Orders in the Change Order tab could be changed before it is shipped to the customer.

Orders

New

To be submitted 2

To be approved 1

Change Order 1

Search

Show 50 Records < 1 > Go To Page:

Narrow Search By:

#	Expand	ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	# of Line Items	Cost
1		34162	6/19/2019-67	2		BIO-VWR			6/24/2019	T	1	122.560
2		34161	2019-06-19-1	2		3333-PH-Fisher			6/19/2019	P	4	2042.200
3		34158	6/18/2019-65	1		BIO-VWR			6/23/2019	T	1	122.560
4		34154	6/18/2019-61	1		BIO-VWR			6/23/2019	T	3	1043.920

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed



c. Receive Tab.

Orders that have been Approved are in the Receive tab.

The screenshot shows the eTurns Orders interface. On the left, there is a vertical sidebar with buttons for New, To be submitted, To be approved, Change Order, and Receive. The 'Receive' button is highlighted with a red box. The main area is titled 'Orders' and contains a search bar and a table of orders. The table columns include: #, Expand, ID, Order Number, Release Number, Shipping Method, Supplier, Staging Name, Comment, Required Date, Order Status, # of Line Items, and Cost. There are four rows of data in the table:

#	Expand	ID	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	# of Line Items	Cost
1		34162	6/19/2019-67	2		BIO-VWR			6/24/2019	T	1	122.560
2		34161	2019-06-19-1	2		3333-PH-Fisher			6/19/2019	P	4	2042.200
3		34158	6/18/2019-65	1		BIO-VWR			6/23/2019	T	1	122.560
4		34154	6/18/2019-61	1		BIO-VWR			6/23/2019	T	3	1043.920

Below the table, a note states: U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed.

- Click on the Order Number and receive the item quantities to increment inventory.
- Click on Receive button on any line item or highlight the row (if more than one row) and click on the Receive All button.
- Save.
- The Items have now been Received incrementing the quantities on hand.

The screenshot shows the eTurns Orders interface. The 'Receive' button on the left sidebar is highlighted with a red box. The main area shows a single line item for order 34162, part number 01-213-104, quantity 10, cost 20.480, and bin WHMain. The 'Receive' button in the table row is also highlighted with a red box. At the bottom of the screen, there are buttons for 'Receive ALL', 'Clear ALL', 'Close Order', 'Close Line Item', 'Edit Receipts', and 'Save Bin'. The status bar at the bottom right shows '17 of 41'.



- Click OK.

Received successfully.

Ok

- This Closes the Order when all the quantities of the item(s) have been Received.

Orders

Room : NoyStock Rm | Created On Date : 7/22/2019 2:13:36 PM | Created By : noy production | Updated On Date : 7/22/2019 2:14:09 PM | Updated By : noy production

Supplier *	BIO-VWR	Order Number *	7/22/2019-34	Required Date *	7/27/2019	Order Status	Closed
-------------------	---------	-----------------------	--------------	------------------------	-----------	---------------------	--------

Cancel

No of line items : 2 | Total Sell Price : \$ 904.160

ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Received quantity	On Hand Quantity	Last Cost	Mark up	Sell Price	Supplier
56942	01-213-104	WHMain	10	10	7/27/2019	10	410	20.480	0	20.480	BIO-VWR
56941	1156308	WHMain	8	8	7/27/2019	8	16	87.420	0	87.420	BIO-VWR

If the quantities in the order are partially received:

- Enter the partial quantity received in the Quantity To Receive column.
- Click the **Receive** button.
- Click Save.

Orders

Room : NoyStock Rm | Created On Date : 7/19/2019 4:15:20 PM | Created By : noy production | Updated On Date : 7/19/2019 4:15:46 PM | Updated By : noy production

Supplier *	BIO-VWR	Order Number *	7/19/2019-23	Required Date *	7/24/2019	Order Status	Transmitted
-------------------	---------	-----------------------	--------------	------------------------	-----------	---------------------	-------------

Save **Cancel**

No of line items : 1 | Total Sell Price : \$ 204.800

#	Item Number	Expand	Receive	Quantity To Receive	Cost	Pack Slip Number	Received Date	Bin	Requested quantity	Approved quantity	Received quantity
1	01-213-104		Receive	5	20.480		7/19/2019	WHMain	10	10	10

Receive ALL **Clear ALL** **Close Order** **Close Line Item** **Edit Receipts** **Save Bin**



The status of a partially receive order will be incomplete.

- The user has the option to wait and receive the remainder of the items or close the order.
- If the user closes the order, no additional quantities will be received against the order and the order status of the order will change to closed.

Orders

Room : NoyStock Rm | Created On Date : 7/19/2019 4:15:20 PM | Created By : noy production | Updated On Date : 7/19/2019 4:18:19 PM | Updated By : noy production

New
Receive
To be submitted
To be approved

Supplier * BIO-VWR Order Number * 7/19/2019-23 Required Date * 7/24/2019 Order Status Incomplete

No of line items : 1 | Total Sell Price : \$ 204.800

Search

Show 250 Records < 1 >	Go To Page: <input type="text"/> Go										
#	Item Number	Expand	Receive	Quantity To Receive	Cost	Pack Slip Number	Received Date	Bin	Requested quantity	Approved quantity	Received quantity
1	01-213-104	<input type="button" value="+"/>	<input type="button" value="Receive"/>	5	20.480		7/19/2019	WHMain	10	10	

d. History Tab.

The history tab displays all the historical orders for the room.

Orders

New
To be submitted
To be approved
Change Order
Receive
History

Search

Show 100 Records < 1 2 3 4 5 ... 6 > Go To Page: Go

Narrow Search By:

#	Expand	Order Number	Release Number	Comment	Order Status	# of Line Items	Required Date	Supplier	Cost	Created On Date	Staging Name	Change Order Revision
1		PO123	30		T	3	11/19/2020	Henry Schein	0.00	11/19/2020 11:05:27 AM		
2		PO123	29		U	0	11/19/2020	Henry Schein	0.00	11/19/2020 10:59:19 AM		
3		PO123	28		U	0	11/19/2020	Henry Schein	0.00	11/19/2020 10:08:04 AM		
4		PO456	41		U	0	11/19/2020	Henry Schein	0.00	11/19/2020 10:05:45 AM	1/9/2020-13	
5		PO123	27		U	0	11/19/2020	Henry Schein	0.00	11/19/2020 9:43:22 AM		
6		PO123	26		T	2	11/19/2020	Henry Schein	0.00	11/19/2020 8:22:46 AM		
7		2020-11-18-1	1	Yea process	C	5	11/18/2020	3333-PH-Fisher	0.00	11/18/2020 2:17:16 PM		
8		11/17/2020-186	1		C	1	11/17/2020	3333-PH-Fisher	0.00	11/17/2020 2:39:43 PM		
9		11/17/2020-185	1		C	4	11/22/2020	WESTBURNE	95669.47	11/17/2020 2:39:41 PM		
10		11/17/2020-184	1		C	1	11/17/2020	Graybar	0.00	11/17/2020 2:39:40 PM		
11		Blanket PO1	16		C	1	11/22/2020	BIO-VWR	0.00	11/17/2020 2:39:37 PM		
12		gt123	1	Direct Order From Receive on Nov 17 2020 10:11PM	C	1	11/17/2020	BIO-VWR	0.00	11/17/2020 2:11:43 PM		
13		2020-11-17-3	1	Test	C	16	11/17/2020	3333-PH-Fisher	353580.00	11/17/2020 2:01:33 PM		

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

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e. Change Log Tab.

The change log is a historical audit trail of the updates and/or changes to the order. To view the change log, click on a row of an Order transaction (highlighting it) while on the History tab, and then click on Change Log tab. The changes will be displayed in yellow.

13		2020-11-17-3	1	Test	C	16	11/17/2020	3333-PH-Fisher	353580.00	11/17/2020 2:01:33 PM		
----	--	--------------	---	------	---	----	------------	----------------	-----------	-----------------------	--	--

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

1 - 100 of 532

Action	Order Number	From Where	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Insert	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	Transmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	Closed
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted
Update	2020-11-17-3	WebSVC:EDIwebService	1		3333-PH-Fisher		Test	11/16/20 7:00:00 pm	UnSubmitted



To view the log for each individual action of the order, click on the Order Number hyperlink. The Order List History detailed page will be displayed.

Orders

Order Log													
Action	Order Number	From Where	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	Rejected Reason	Customer	Pack Slip Number	Updated On Date
Update	7/22/2019-33	cart	1		BIO-VWR			7/26/19 7:00:00 pm	Transmitted				7/22/2019 12:24:36 PM
Update	7/22/2019-33	cart	1		BIO-VWR			7/26/19 7:00:00 pm	Closed				7/22/2019 12:37:36 PM
Insert	7/22/2019-33	cart	1		BIO-VWR			7/26/19 7:00:00 pm	UnSubmitted				7/22/2019 12:24:36 PM

- Click the "+" icon to view the header details of the Order.
- Click the "-" icon to close the header details of the Order.

Order List History

Room : Northrop Promontory L3 | Created On Date : 11/19/2020 12:03:02 PM | Created By : eTurns User | Updated On Date : 11/19/2020 12:03:15 PM | Updated By : WilliamsC

<input checked="" type="radio"/>	* Order Number	SS Con fillup-130	Supplier	Graybar	Required Date	11/19/2020	Order Status	Unsubmitted
----------------------------------	----------------	-------------------	----------	---------	---------------	------------	--------------	-------------

Order List History

Room : Northrop Promontory L3 | Created On Date : 11/19/2020 12:03:02 PM | Created By : eTurns User | Updated On Date : 11/19/2020 12:03:15 PM | Updated By : WilliamsC

<input checked="" type="radio"/>	* Order Number	SS Con fillup-130	Supplier	Graybar	Required Date	11/19/2020	Order Status	Unsubmitted
----------------------------------	----------------	-------------------	----------	---------	---------------	------------	--------------	-------------

<input checked="" type="radio"/>	Comment	Pack Slip Number
Release Number	1	Shipping Tracking #
Shipping Method		Phone Number
Staging Name		<input type="checkbox"/> Check the textbox or dropdowns if you want to have this value preserved when you visit this page next time.
Customer		

Order List History

Room : Northrop Promontory L3 | Created On Date : 11/19/2020 12:03:02 PM | Created By : eTurns User | Updated On Date : 11/19/2020 12:03:15 PM | Updated By : WilliamsC

<input checked="" type="radio"/>	* Order Number	SS Con fillup-130	Supplier	Graybar	Required Date	11/19/2020	Order Status	Unsubmitted
----------------------------------	----------------	-------------------	----------	---------	---------------	------------	--------------	-------------

<input checked="" type="radio"/>	Comment	Pack Slip Number
Release Number	1	Shipping Tracking #
Shipping Method		Phone Number
Staging Name		<input type="checkbox"/> Check the textbox or dropdowns if you want to have this value preserved when you visit this page next time.
Customer		

Order List History

Room : Northrop Promontory L3 | Created On Date : 11/19/2020 12:03:02 PM | Created By : eTurns User | Updated On Date : 11/19/2020 12:03:15 PM | Updated By : WilliamsC

<input checked="" type="radio"/>	* Order Number	SS Con fillup-130	Supplier	Graybar	Required Date	11/19/2020	Order Status	Unsubmitted
----------------------------------	----------------	-------------------	----------	---------	---------------	------------	--------------	-------------



Note: The Change log is displayed in view only mode. No changes/edit can be made.

5. Edit/Update an Order

Edit or update an existing order with an Unsubmitted Order Status. Click on the Order Name (hyperlink) on the To Be Submitted Tab and the Order details page will be displayed.

The screenshot shows the 'Orders' search interface. On the left, there are tabs for 'New', 'To be submitted' (highlighted with a red box), and 'To be approved'. The main area is a search grid with columns: #, Expand, ID, Order Number. A specific row is selected, and its Order Number '6/25/2019-84' is highlighted with a red box and has a hand cursor icon over it. Below the grid, there's a note: 'U = Unsubmitted, S = Submitted, A = Approved'.

Note: The Status of the Order must be Unsubmitted to enable editing. If the Order Status is closed, unclose the Order. If the Order Status is Transmitted, Close the Order and click on Edit Order Line Items.

- The Supplier can be changed. Click on the drop-down arrow to choose another supplier.
- The Order Name can be edited.
- The Required Date can be changed for the order or per line item.
- The Status can be updated from Unsubmitted to Submitted, Approved or Closed.
- Click on the **Add New Item** button to add new items to the Order.
- Click on the **Add from Catalog** button to add new items from a catalog to the existing Order.
- Change Bin locations by clicking on the drop-down arrow. Orders will increment the quantity in the bin location chosen.
- The Requested Quantity can also be edited.
- Click Save.

The screenshot shows the 'Orders' details page for Order Number 6/25/2019-84. The 'To be submitted' tab is selected. At the top, there are fields for Supplier (BIO-VWR), Order Number (6/25/2019-84), Required Date (6/30/2019), and Order Status (Unsubmitted). Below these are buttons for 'Add New Item' and 'Add from Catalog'. The main area is a grid of order line items with columns: #, ID, Item Number, Bin, Requested quantity, Approved quantity, Required Date, Received quantity, On Hand Quantity, Staged Quantity, Description, Unit, GL Account, Last Cost, Mark up, Sell Price, Supplier, On Order Quantity, and On Return Quantity. The first three line items are shown in the grid.



6. Update a Closed Order

The **Update Close Order** button allows the Required Date and the Comment section to be updated. No other section of the closed order can be updated with this function and the Order Status remains Closed.

Click on the Order Number of an existing closed Order.

The screenshot shows a search interface for 'Orders'. On the left, there are buttons for 'New', 'submitted', and 'To be submitted'. The main area has a search bar with a magnifying glass icon and a dropdown menu for 'Narrow Search By' with options like 'Supplier', 'Order Status', and 'Required Date'. Below this is a table with columns: '#', 'Expand', 'ID', and 'Order Number'. The first row shows record 1 with Order Number '34183'. A cursor is hovering over the 'Order Number' field for record 1.

- Click on the Required Date or the Comment section to update.
- When finished click on the **Update Close Order** button to save the changes.

The screenshot shows the 'Edit' tab selected in the 'Orders' interface. At the top, it displays room information and creation details. Below is a form with fields for 'Supplier' (BIO-VWR), 'Order Number' (6/25/2019-84a), 'Required Date' (6/30/2019), and 'Order Status' (Closed). Underneath is a table of line items with columns like '#', 'ID', 'Item Number', 'Bin', etc. A modal window is open over the table, showing a grid of dates for July 2019. The 'Required Date' field in the modal is set to 6/30/2019. At the bottom right of the modal, the 'Update Close Order' button is highlighted with a red box.

7. Unclose a Closed Order

Unclose an Order to edit the Order details, such as but not limited to Quantity to receive, Receive date or Bin location. When a Closed Order is Unclosed it will revert back to its previous Order Status (Unsubmitted, Transmitted or Incomplete) but will not unreceive any received items.

The *Edit Order Line Items* function reverses everything that was processed in a closed order, including any received items. To unclose an order, click on the Name of an existing closed Order.

- Click on the **Unclose Order** button.

- The page will refresh and display the Orders page, with the Order Status reverting back to its previous Status (Unsubmitted, Transmitted or Incomplete).
- Edit the Order if needed (following instructions on #4 Edit/Update Order)
 - Edit/Change Supplier
 - Edit/Change Order Number
 - Edit/Change Required Date for the Order or per line item
 - Add New Item
 - Add items from Catalog
 - Edit/Change Bin location
 - Edit/Change Requested quantity
 - Edit/Change Approved quantity
- Save.

8. Edit Order Line Items

The Edit Order Line Items reverses everything that was processed in a Closed Order Status, including any Received items and reverts the Order Status to Unsubmitted.

- To Edit Order Line Items, click on the Name of an existing Closed Order.

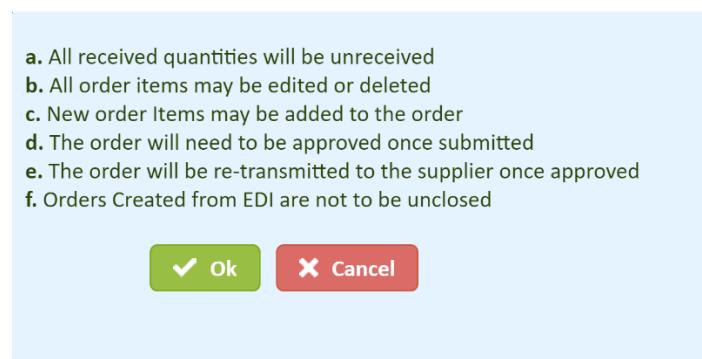
A screenshot of the eTurns Orders search interface. The search bar at the top has the word 'Search' and a magnifying glass icon. Below it is a table with columns: '#', 'Expand', 'ID', and 'Order Number'. A dropdown menu labeled 'Narrow Search By:' is open, showing 'Supplier', 'Order Status', and 'Required Date'. The 'Order Number' column for the selected row (ID 34183) contains the value '6/25/2019-84a' with a cursor pointing to the end of the string.

- Click on **Edit Order Line Items** button.

A screenshot of the eTurns Order edit screen. The left sidebar shows tabs: 'New', 'a submitted', 'To be submitted', 'To be approved', and 'Order'. The 'Edit' tab is selected. At the top, there are fields for 'Supplier' (3333-PH-Fisher), 'Order Number' (7/19/2019-96), 'Required Date' (7/19/2019), and 'Order Status'. Below these are buttons: 'Edit Order Line Items' (highlighted with a red box), 'Unclose Order', and 'Cancel'. A message below says 'No of line items : 1 | Total Sell Price : \$ 0.000'. At the bottom is a table with columns: ID, Item Number, Bin, Requested quantity, Approved quantity, Required Date, Received quantity, On Hand Quantity, Last Cost, Mark up, and Sell Price. The 'Received quantity' and 'On Hand Quantity' columns are highlighted with a red box.

Figure A

- The following prompt is displayed.
- Click OK.



- All received quantities will be unreceived
- All order items may be edited or deleted



- c. New order items may be added to the order
- d. The order will need to be approved once submitted
- e. The order will be re-transmitted to the supplier once approved
- f. Orders Created from EDI are not to be unclosed

Compare Figure A and Figure B.

Orders

Room : NoyStock Rm | Created On Date : 7/19/2019 4:55:36 PM | Created By : noy production | Updated On Date : 7/22/2019 8:56:33 AM | Updated By : noy production

Edit

To be submitted

Supplier * 3333-PH-Fisher Order Number * 7/19/2019-96 Required Date * 7/19/2019 Order Status Unsubmitted

Save Cancel

Add New Item Add from Catalog

No of line items : 1 | Total Sell Price : \$ 0.000

Search

Item Number	Bin	Requested quantity	Approved quantity	Required Date	Received quantity	On Hand Quantity	Staged Quantity	Mark up	Sell Price	Supplier	On Order Quantity	Last C
i27June	Bin1	1	1	7/19/2019	0	97	0	0	0.000	WESTBURNE	1	

Figure B

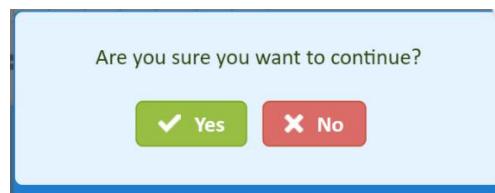
- The received quantity of one (1) has been unreceived and is now zero (0) in the column Received Quantity.
- The on hand quantity has been decremented, it was previously 98 and is now 97.
- Order Status has changed to Unsubmitted.
- Edit the Order if needed (following instructions on #4 Edit/Update Order)
 - a. Edit/Change Supplier
 - b. Edit/Change Order Number
 - c. Edit/Change Required Date for the Order or per line item
 - d. Add New Item
 - e. Add items from Catalog
 - f. Edit/Change Bin location
 - g. Edit/Change Requested quantity
 - h. Edit/Change Approved quantity
- Change Order Status to Submit, Approved or Close.
- Save.

9. Delete an Order

To delete an order, click on the row or rows, highlighting it and click on Delete icon or press Delete key on your keyboard.

Orders															
New	To be submitted														
Narrow Search By:			#	Expand	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	# of Line Items
		Supplier	1		34341		7/19/2019-96	1		3333-PH-Fisher		Different Supplier test Submitted then close	7/19/2019	U	1
		Order Status	2		34340		7/19/2019-27	1		BIO-VWR		Approved then closed	7/24/2019	C	1

- Click yes to delete the selected row(s).

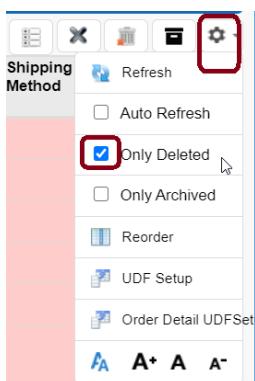


- Confirmation of the Order(s) deleted.

Orders															
New	To be submitted														
Narrow Search By:			#	Expand	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status	# of Line Items
		Supplier	1		34340		7/19/2019-22	1		BIO-VWR		Approved then closed	7/24/2019	C	1
		Order Status	2		34339		7/19/2019-26	1		BIO-VWR		Submitted Order status then closed	7/24/2019	C	1
		Required Date	3		34338		7/19/2019-25	1		BIO-VWR		Submitted Order Status then closed	7/24/2019	C	1
			4		34337		7/19/2019-24	1		BIO-VWR		Unsubmitted order status then closed.	7/24/2019	C	1
			5		34336		7/19/2019-23	1		BIO-VWR			7/24/2019	C	1
			6		34333		7/19/2019-21	1		BIO-VWR		Direct Order From Receive on Jul 19 2019 5:17PM	7/19/2019	C	1

Note: When deleting an order, received quantities are not reversed or unreceived. The quantity on hand is not decremented by the deleted order.

- To view deleted Orders, click on the settings wheel and check the box *Only Deleted*.



10. Close Multiple Open Orders

To close multiple open orders, click on the row(s) highlighting it and click on the close icon

Orders

Orders											
Search <input type="text"/> Show 10 Records < 1 2 3 4 5 ... 15 > Go To Page: <input type="text"/> Go											
Narrow Search By:	#	Expand	ID	Order Header UDF	Order Number	Release Number	Supplier	Required Date	Order Status	Shipping Method	Staging Name
Supplier	1		34355		7/23/2019-37	1	BIO-VWR	7/28/2019	T		
Order Status	2		34354		7/23/2019-36	1	BIO-VWR	7/28/2019	T		
Required Date	3		34353		7/23/2019-35	1	BIO-VWR	7/28/2019	U		
Shipping Vendor	4		34352		7/22/2019-34	1	BIO-VWR	7/27/2019	C		

- Click yes to close the selected row(s).

Are you sure you want to close selected order(s)?

Yes

No

- Confirmation of Order(s) closed.

Orders

Orders														
Search <input type="text"/> Show 10 Records < 1 2 3 4 5 ... 15 > Go To Page: <input type="text"/> Go														
Narrow Search By:	#	Expand	ID	Order Header UDF	Order Number	Release Number	Supplier	Required Date	Order Status	Shipping Method	Staging Name	Comment	# of Line Items	Cost
Supplier	1		34355		7/23/2019-37	1	BIO-VWR	7/28/2019	C				1	
Order Status	2		34354		7/23/2019-36	1	BIO-VWR	7/28/2019	C				1	20
Required Date	3		34353		7/23/2019-35	1	BIO-VWR	7/28/2019	C				1	69
Shipping Vendor	4		34352		7/22/2019-34	1	BIO-VWR	7/27/2019	C				2	90
User (Created by)	5		34351		7/22/2019-33	1	BIO-VWR	7/27/2019	C				1	63
User (Updated by)	6		34350		7/22/2019-32	1	BIO-VWR	7/27/2019	C					
Date Created														



11. Print or Export the Order

Print or export the Order by clicking the row(s), highlighting it, and clicking on the printer icon . Print or export through the following options:

The screenshot shows a grid of orders with columns for Order Status, # of Line Items, Required Date, Supplier, Cost, Created On Date, Staging Name, Change Order Revision, Pack Slip Number, Customer, and Shipping Method. A context menu is open over the third row, with the 'Email' option highlighted. Other options in the menu include 'Orders', 'Orders', and 'Bar Code Label'. The printer icon is also circled in red.

- a) **Email:** Click the row(s) to email as an attachment in Excel or PDF format.

The dialog box has a title 'Send Report In Email' and a note: 'Note: Please enter multiple Email address in 'Send To and Send CC' with ","(comma) separate.' It includes fields for 'Send To:' (noy@eturns.com), 'CC:', 'Subject:', and 'Body:' (Attached are the orders). There are checkboxes for 'Excel' and 'PDF' (which is checked). At the bottom are 'Cancel' and 'Send Email' buttons.

- b) **Orders:** Displays the Order in a new browser tab that can be saved or exported to Excel, PDF or Word document.

The screenshot shows an order detail page with a header 'Order' and a date '6/28/2019 2:57:06 PM'. It displays various order details like Company (Noy Testing), Order # (PO456), Supplier (Henry Schein 123 Irvine, ca 92630), Comment, Order Status (Closed), Tracking #, Created By (noy production), and a barcode. At the top right, there are buttons for 'Print', 'Find | Next', and file formats: Excel, PDF, and Word. The PDF button is highlighted. The page footer says '1 of 1'.



- c) Excel: Converts the Order to an excel spreadsheet. Click on the downloaded excel spreadsheet to open the file.

The screenshot shows the eTurns software interface with a list of orders. On the left, there are filters for 'Supplier', 'Order Status', 'Required Date', 'Shipping Vendor', 'User (Created by)', 'User (Updated by)', 'Date Created', 'From', 'To', 'Date Updated', 'From', and 'To'. The main area displays 8 rows of order data. At the bottom left, there is a download link labeled 'Order_2019-06-28....xls' with a red box around it. The bottom right corner has a 'Show all' link.

- The file opens in an excel spreadsheet.

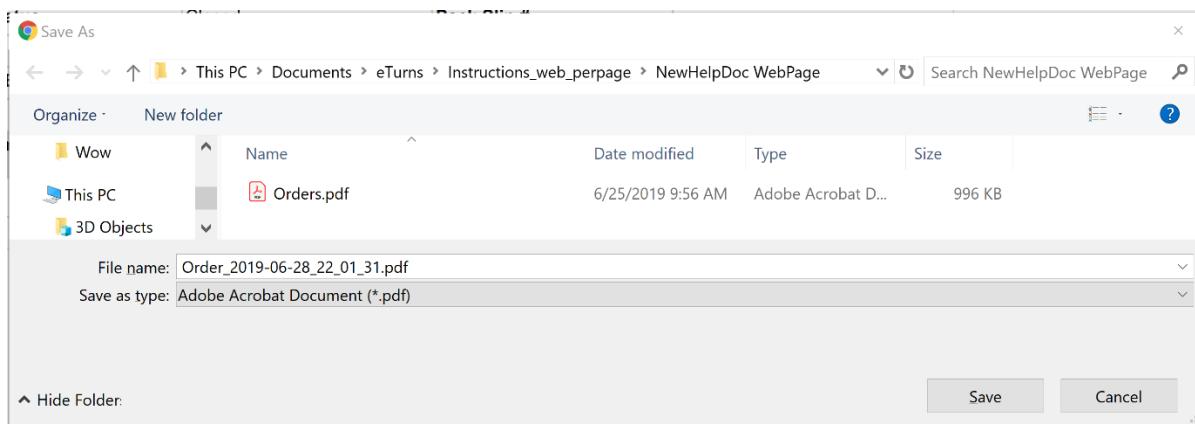
The screenshot shows an Excel spreadsheet titled 'Order'. The top row contains the eTurns logo and the word 'Order'. The second row shows the date '6/28/2019 2:59:11 PM'. The third row has a 'Company' field with 'Noy Testing', a 'Room' field with 'NoyStock Rm', and a 'Tracking #' field with '7'. The fourth row has an 'Order #' field with 'PO456', a 'Supplier' field with 'Henry Schein', a 'Comment' field with '123', a 'Required Date' field with '6/26/2019', and a 'Customer' field. The fifth row has an 'Order Status' field with 'Closed', a 'Pack Slip #' field, and an 'Updated By' field with 'noy production'. The sixth row contains a barcode. The seventh row is a summary table with columns: ItemNumber, RequestedQua, ApprovedQua, ReceivedQuan, UpdatedByNa, BinName, Cost, and Total. It shows one item with a quantity of 9, a cost of \$150.000, and a total of \$1,350.000. The bottom row is a 'Total' row with the same values.

- d) PDF: Converts the Order to a PDF format. Click on the download icon

The screenshot shows a PDF document titled 'RPT_d2644825_a932_4977_b04e_a8056a6f2c49'. The top right corner shows '1 / 1'. The document contains the eTurns logo and the word 'Order'. The second page shows the date '6/28/2019 3:01:31 PM'. The third page has a 'Company' field with 'Noy Testing', a 'Room' field with 'NoyStock Rm', and a 'Tracking #' field with '7'. The fourth page has an 'Order #' field with 'PO456', a 'Supplier' field with 'Henry Schein', a 'Comment' field with '123', a 'Required Date' field with '6/26/2019', and a 'Customer' field. The fifth page has an 'Order Status' field with 'Closed', a 'Pack Slip #' field, and an 'Updated By' field with 'noy production'. The sixth page contains a barcode. The seventh page is a summary table with columns: ItemNumber, RequestedQua, ApprovedQua, ReceivedQua, UpdatedByNa, BinName, Cost, and Total. It shows one item with a quantity of 9, a cost of \$150.000, and a total of \$1,350.000. The bottom page is a 'Total' page with the same values.



- Save the downloaded file as a PDF.

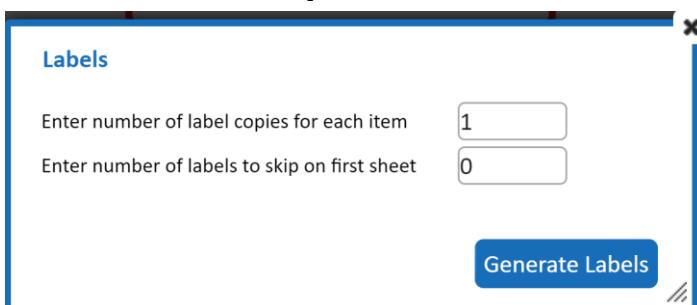


- e) Barcode Label: Prints barcodes on Items that were ordered. Used by customers to print barcodes on items ordered to scan when they are received.

Orders

#	Expand	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comments
1		34340		7/19/2019-27	1		BIO-VWR		Approved then c...
2		34339		7/19/2019-26	1		BIO-VWR		Submitted Order then c...

- Click on Generate Labels and print.



Name: 6/12/2019-13 add text
Asset:
ProjectSpend:
UDF1: John Cox



Desc:

Name: 6/12/2019-10
Asset:
ProjectSpend:
UDF1: John Cox



Desc:

Customer: Customer 1
Tool:
UDF2:
Name: 6/12/2019-11
Asset:
ProjectSpend:
UDF1: John Cox



Desc:

Customer: Customer 1
Tool:
UDF2:
Name: 6/5/2019-9
Asset:
ProjectSpend:
UDF1: John Cox



Desc:

12. Orders and EDI integration

For suppliers integrated through EDI, check the box “Send EDI to Vendor” in the supplier’s page.

- To setup, point the mouse over Administration, Supporting Information and click on Suppliers.

#	ID	Supplier
3	11727	sp13june
4	11559	Graybar
5	11552	WESTBURNE

- The Suppliers List page is displayed.
- Click on a Supplier name hyperlink.

#	ID	Supplier	Description	Address	City	State	Zip Code
1	11727	sp13june					

- The Supplier details page is displayed.

General Details

Supplier Name *	sp13june
Supplier Color *	#9A8326
Description	
Branch Number	
Maximum Order Size	
Default Order Required Days	

Address Details

Address	
City	
State	
Zip Code	
Country	
Contact *	
Phone *	
Fax	

Other Details

Send EDI to Vendor	<input checked="" type="checkbox"/>
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- Check the box, *Send EDI to Vendor* checkbox

Other Details

Send EDI to Vendor	<input checked="" type="checkbox"/>
Vendor Return ASN	<input type="checkbox"/>
Supplier Needs Kit Components	<input type="checkbox"/>

- And click Save.

For Suppliers that are not integrated through EDI, uncheck the Send EDI to Vendor box.

- The Orders will be sent to the supplier by another means, other than EDI.
- In the Auto Order Settings set to *None* – for no automation.

Order Schedule Details

Auto Order Settings	<input checked="" type="radio"/> None	<input type="radio"/> Immediate	<input type="radio"/> Hourly	<input type="radio"/> Daily	<input type="radio"/> Weekly	<input type="radio"/> Monthly
---------------------	---------------------------------------	---------------------------------	------------------------------	-----------------------------	------------------------------	-------------------------------

Automate Orders in the Cart in the Order Schedule Details. This function is independent from the EDI setting.

- Immediate* – the order schedule is set to immediately run.
 - Auto Generate* – suggested orders in the Cart will auto generate to become an order. The order will be in the To Be Submitted tab or in an unsubmitted status.
 - Auto Generate & Submit* – suggested orders in the Cart will auto generate to become an order. The order will be in the Approved status (depending on the user's permissions) waiting to be received.
 - Is Active* – check the box to activate the schedule selected.

Order Schedule Details

Auto Order Settings	<input type="radio"/> None	<input checked="" type="radio"/> Immediate	<input type="radio"/> Hourly	<input type="radio"/> Daily	<input type="radio"/> Weekly	<input type="radio"/> Monthly
	<input type="radio"/> Auto Generate					
	<input type="radio"/> Auto Generate & Submit					
	<input checked="" type="checkbox"/> IsScheduleActive					
Next Run Date						

- Hourly* – creating orders will run hourly based on settings.

Order Schedule Details

Auto Order Settings	<input type="radio"/> None	<input type="radio"/> Immediate	<input checked="" type="radio"/> Hourly	<input type="radio"/> Daily	<input type="radio"/> Weekly	<input type="radio"/> Monthly
Every	4	Hours at Every	0	▼	Minutes ,	
	<input type="radio"/> Auto Generate					
	<input checked="" type="radio"/> Auto Generate & Submit					
	<input checked="" type="checkbox"/> IsScheduleActive					
Next Run Date						



- Daily – creating orders will run daily based on settings selected. Click on the Schedule Run Time field to set the time.

Order Schedule Details

Auto Order Settings	<input type="radio"/> None <input type="radio"/> Immediate <input type="radio"/> Hourly <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input checked="" type="radio"/> Every <input type="radio"/> 3 Days <input type="radio"/> Every Week Days
ScheduleRunTime	00:00
<input checked="" type="checkbox"/> IsScheduleActive	
Next Run Date	

- Weekly – creating orders will run weekly based on settings selected. Click on the Schedule Run Time field to set the time.

Order Schedule Details

Auto Order Settings	<input type="radio"/> None <input type="radio"/> Immediate <input type="radio"/> Hourly <input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly Recurring every <input type="radio"/> 1 Weeks On <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday
ScheduleRunTime	16:00
<input checked="" type="checkbox"/> IsScheduleActive	
Next Run Date	

- Monthly – order schedule will run monthly based on the settings selected. Click on the Schedule Run Time field to set the time.

Order Schedule Details

Auto Order Settings	<input type="radio"/> None <input type="radio"/> Immediate <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input checked="" type="radio"/> Monthly <input checked="" type="radio"/> Days <input type="radio"/> 1 of Every <input type="radio"/> 1 Months <input type="radio"/> The First ▾ Monday ▾ of Every <input type="radio"/> Months
ScheduleRunTime	16:00
<input checked="" type="checkbox"/> IsScheduleActive	
Next Run Date	

13. Search Orders page

Two options to search the Orders page:

a. Main Search:

Enter the keyword in the search box. The keyword search results are highlighted in yellow. Search results are filtered after the third character is typed.

Orders

#	Expand	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status
1		34312		7/18/2019-14	1		BIO-VWR			7/23/2019	C
2		23128		9/14/2018-10	1		3334-BIO-Fisher			9/14/2018	C
3		23127		9/14/2018-9	1		3364-CH-Fisher			9/14/2018	C

Orders

#	Expand	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date	Order Status
1		23128		9/14/2018-10	1		3334-BIO-Fisher			9/14/2018	C

b. Narrow Search by:

This function is used to filter or narrow down the scope of search for user convenience. It is an alternate or can be used in conjunction with the (main) Search function.

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

#	Expand	Order Number	Release Number	Comment	Order Status
1		PO123	30		P
2		PO123	29		U
3		PO123	28		U
4		PO456	41		U
5		PO123	27		U
6		PO123	26		P
7		2020-11-18-1	1	Yea process	C
8		11/17/2020-186	1		C

- Click on the double-arrow and check the box to narrow the search. The numbers in parenthesis indicate the number of items found with the narrow search criteria.

Narrow Search By:

Supplier

Filter: Check Uncheck

<input type="checkbox"/> 3334-BIO-Fisher (4)
<input type="checkbox"/> 3363-CL-Fisher (4)
<input type="checkbox"/> 3364-CH-Fisher (7)
<input checked="" type="checkbox"/> BIO-VWR (31)
<input type="checkbox"/> Graybar (9)
<input type="checkbox"/> Henry Schein (28)
<input type="checkbox"/> sp13june (2)
<input type="checkbox"/> WESTBURNE (19)

Date Updated

From

To

Clear

Note: Fields within the narrow search may vary from module to module.

Narrow Search By:

Supplier 1 selected

Filter: Check Uncheck

<input type="checkbox"/> 3333-PH-Fisher (63)
<input type="checkbox"/> 3334-BIO-Fisher (6)
<input type="checkbox"/> 3363-CL-Fisher (7)
<input type="checkbox"/> 3364-CH-Fisher (7)
<input checked="" type="checkbox"/> BIO-VWR (207)
<input type="checkbox"/> Graybar (47)
<input type="checkbox"/> Henry Schein (108)
<input type="checkbox"/> sp13june (3)
<input type="checkbox"/> WFS TRI IRNF (84)

- Number in () is the # of items for that search result
- Filter: Enter keywords to search within the selected category
- Filter:
- Check the box to filter a search result. BIO-VWR (31)
- Click Check Uncheck Check to select all
- Click Uncheck to remove all selections
- Click to close the Narrow Search filter
- This applies to all Narrow Search functions

Field	Description
Supplier/Order Status/Required Date/Shipping Vendor	<p>It is used to filter the module to the selected Narrow Search field. Click on up-down arrow key. Dropdown appears:</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>Supplier</p> <p>Filter: Enter keywords</p> <p>Check Uncheck</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3334-BIO-Fisher (4) <input type="checkbox"/> 3363-CL-Fisher (4) <input type="checkbox"/> 3364-CH-Fisher (7) <input checked="" type="checkbox"/> BIO-VWR (31) <input type="checkbox"/> Graybar (9) <input type="checkbox"/> Henry Schein (28) <input type="checkbox"/> sp13june (2) <input type="checkbox"/> WESTBURNE (19) </div> <div style="text-align: center;"> <p>Order Status</p> <p>Filter: Enter keywords</p> <p>Check Uncheck</p> <ul style="list-style-type: none"> <input type="checkbox"/> Closed (117) </div> </div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>Required Date</p> <p>Filter: Enter keywords</p> <p>Check Uncheck</p> <ul style="list-style-type: none"> <input type="checkbox"/> > 3 weeks (0) <input type="checkbox"/> 2-3 weeks (0) <input type="checkbox"/> Next weeks (0) <input checked="" type="checkbox"/> This weeks (8) </div> <div style="text-align: center;"> <p>Shipping Vendor</p> <p>Filter: Enter keywords</p> <p>Check Uncheck</p> <ul style="list-style-type: none"> </div> </div> <p>User can select or unselect all of the items of the list using the Check or Uncheck button. The module reflects the filter selections made.</p>
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> <div style="text-align: center;"> <p>User (Created by)</p> <p>Filter: Enter keywords</p> <p>Check Uncheck</p> <ul style="list-style-type: none"> <input type="checkbox"/> eTurns User (3) <input type="checkbox"/> hardik (5) <input type="checkbox"/> nlachica (13) <input type="checkbox"/> Noy (11) <input type="checkbox"/> noy production (85) </div> <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. Select 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>Dropdown appears:</p>
-----------------	--

Date Created and Date Updated	<p>Used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar drop-down. Enter 'From-To' time period to be filtered. The module displays the search results for the selected time period.</p> <p>Note: To reset the selections made click on </p> <p>Note: To clear the entire selection, click </p>
-------------------------------	--

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

14. View records and Go To specific Page

Click on the drop-down arrow and select the number of records to display in a page. Type the page number in the Go To Page field and click Go, to go to a specific page.

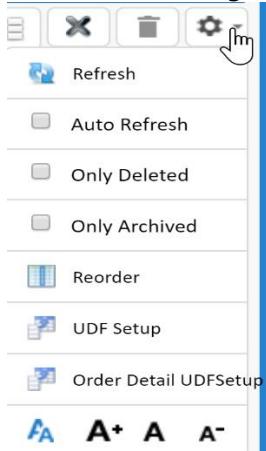
Orders

Narrow Search By:		Show	10	ID	Order Header UDF	Order Number	Release Number	Shipping Method	Supplier	Staging Name	Comment	Required Date
Supplier		#	10	25					BIO-VWR			
Order Status			25	50	34312	7/18/2019-14	1					7/23/2019
Required Date			50	100	23128	9/14/2018-10	1		3334-BIO-Fisher			9/14/2018
Shipping Vendor			100	250	23127	9/14/2018-9	1		3364-CH-Fisher			9/14/2018
			250	500					3333-PH-			
			500	1000	23126	9/14/2018-	1					9/14/2018

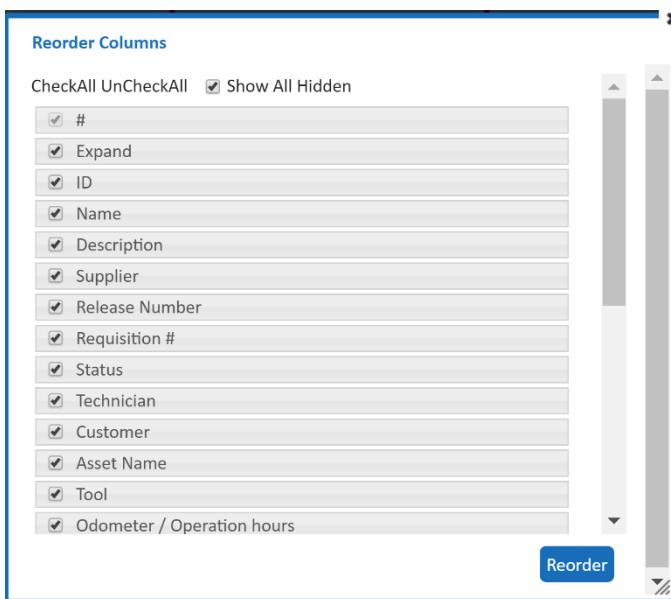
Note: Show records functionality enables user to select from 10, 25, 50, 100, 250, 500 and 1,000 items to be displayed per page. The number of records selected will affect the time it takes to display in a page. The greater the number of records the longer it takes to display in a page.

15. Wheel Settings

Click on the Wheel Settings icon to display various settings on the module.



- a) Refresh: This option refreshes the module and displays the latest changes.
- b) Auto Refresh: This option automatically refreshes the screen.
- c) Only Deleted: This option displays only the deleted items. To select, check the box Only Deleted.
- d) Only Archived: This option displays only the archived items. To select, check the box Only Archived.
- e) Reorder: This option enables the user to reorder the columns of the module.
 - User may drag and drop fields to be arranged in order of choice.
 - User can also select which fields are displayed or hidden. Check or uncheck the box corresponding to a field to display or hide.
 - Check All or UnCheck All boxes.
 - Check box to Show All Hidden fields.



- Click Reorder to apply the selection(s).

f) UDF Setup: Setup up to 5 User Defined Fields to further describe each order.

UDF Setting for Orders											
ID	Column Header	UDF Name	PDA UDF	Control Type	Default Value	Required	Include in Narrow Search	Created On Date	Updated On Date	Updated By	Created By
1451	UDF1	Order Header UDF	UDF1	Textbox		<input type="checkbox"/>	<input type="checkbox"/>	10/16/2018 8:25:37 AM	7/1/2019 3:24:03 PM	noy production	noy production
1452	UDF2	UDF2	UDF2			<input type="checkbox"/>	<input type="checkbox"/>	10/16/2018 8:25:37 AM	10/16/2018 8:25:37 AM	noy production	noy production
1453	UDF3	UDF3	UDF3			<input type="checkbox"/>	<input type="checkbox"/>	10/16/2018 8:25:37 AM	10/16/2018 8:25:37 AM	noy production	noy production
1454	UDF4	UDF4	UDF4			<input type="checkbox"/>	<input type="checkbox"/>	10/16/2018 8:25:37 AM	10/16/2018 8:25:37 AM	noy production	noy production
1455	UDF5	UDF5	UDF5			<input type="checkbox"/>	<input type="checkbox"/>	10/16/2018 8:25:37 AM	10/16/2018 8:25:37 AM	noy production	noy production

- Click on UDF column header name to define the UDF and save.

UDF Setting for Orders

Created On Date : 10/16/2018 8:25:37 AM | Created By : noy produ
Updated By : noy production

Is Deleted	<input type="checkbox"/>
UDF1 *	Order Header UDF
PDA UDF *	UDF1
Required	<input type="checkbox"/>
Include in Narrow Search	<input type="checkbox"/>
Control Type *	Textbox
UDFMaxLength	200
Default Textbox Value	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Orders

Room : NoyStock Rm | Created On Date : 7/22/2019 12:24:35 PM | Created By : eTurns User | Updated On Date : 7/22/2019 12:37:36 PM | Updated By : noy production

<input type="button" value="Supplier *"/>	BIO-VWR	Order Number *	7/22/2019-33	Required Date *	7/27/2019	Order Status	Closed
Comment				Pack Slip Number			
Release Number	1			Drop ship address			
Shipping Tracking #				Order Header UDF			
Shipping Vendor							
Shipping Method							
Staging Name							
Customer							
<input type="button" value="Edit Order Line Items"/> <input type="button" value="Unclose Order"/> <input type="button" value="Cancel"/>							

- a) Order Detail UDF Setup: Setup up to 5 User Defined Fields in the Order details.

Orders

Room : NoyStock Rm | Created On Date : 7/1/2019 1:25:38 PM | Created By : eTurns User | Updated On Date : 7/1/2019 1:33:07 PM | Updated By : noy production

<input type="button" value="Supplier *"/>	BIO-VWR	Order Number *	7/1/2019-5	Required Date *	7/6/2019	Order Status	Closed																																																								
<input type="button" value="Edit Order Line Items"/> <input type="button" value="Unclose Order"/> <input type="button" value="Cancel"/>																																																															
No of line items : 1 Total Sell Price : \$ 699.360																																																															
<table border="1"> <thead> <tr> <th colspan="12">Search <input type="text"/></th> </tr> <tr> <th>Show</th> <th>10</th> <th>Records</th> <th><</th> <th>1</th> <th>></th> <th colspan="6">Go To Page: <input type="text"/> Go</th> <th>Settings</th> </tr> <tr> <th>Item</th> <th>Maximum Quantity</th> <th>Minimum Quantity</th> <th>Category</th> <th>On Order In Transit Quantity</th> <th>Default Reorder quantity</th> <th>On Return Quantity</th> <th>Mfg Name</th> <th>Supplier</th> <th>Mfg Item #</th> <th>Last Cost</th> <th>Supplier Item #</th> <th>GL Account</th> <th>Order Details UDF in row</th> <th>Suggested Order Quantity</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>699.360</td> <td>8</td> <td>2</td> <td></td> <td>0</td> <td>8</td> <td>0</td> <td>Henry Schein Inc.</td> <td>BIO-VWR</td> <td>2009828-024</td> <td>87.420</td> <td>1156308</td> <td></td> <td></td> <td>0 EA</td> </tr> </tbody> </table>								Search <input type="text"/>												Show	10	Records	<	1	>	Go To Page: <input type="text"/> Go						Settings	Item	Maximum Quantity	Minimum Quantity	Category	On Order In Transit Quantity	Default Reorder quantity	On Return Quantity	Mfg Name	Supplier	Mfg Item #	Last Cost	Supplier Item #	GL Account	Order Details UDF in row	Suggested Order Quantity	Unit	699.360	8	2		0	8	0	Henry Schein Inc.	BIO-VWR	2009828-024	87.420	1156308			0 EA
Search <input type="text"/>																																																															
Show	10	Records	<	1	>	Go To Page: <input type="text"/> Go						Settings																																																			
Item	Maximum Quantity	Minimum Quantity	Category	On Order In Transit Quantity	Default Reorder quantity	On Return Quantity	Mfg Name	Supplier	Mfg Item #	Last Cost	Supplier Item #	GL Account	Order Details UDF in row	Suggested Order Quantity	Unit																																																
699.360	8	2		0	8	0	Henry Schein Inc.	BIO-VWR	2009828-024	87.420	1156308			0 EA																																																	

- b) A, A, A: Allows the user to increase or decrease the font size of the Items.

16. Miscellaneous settings

Grid in History tab may have the following functionality:

- 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) Multi selection of rows by clicking each row.