



Process

Carmen Gagnon

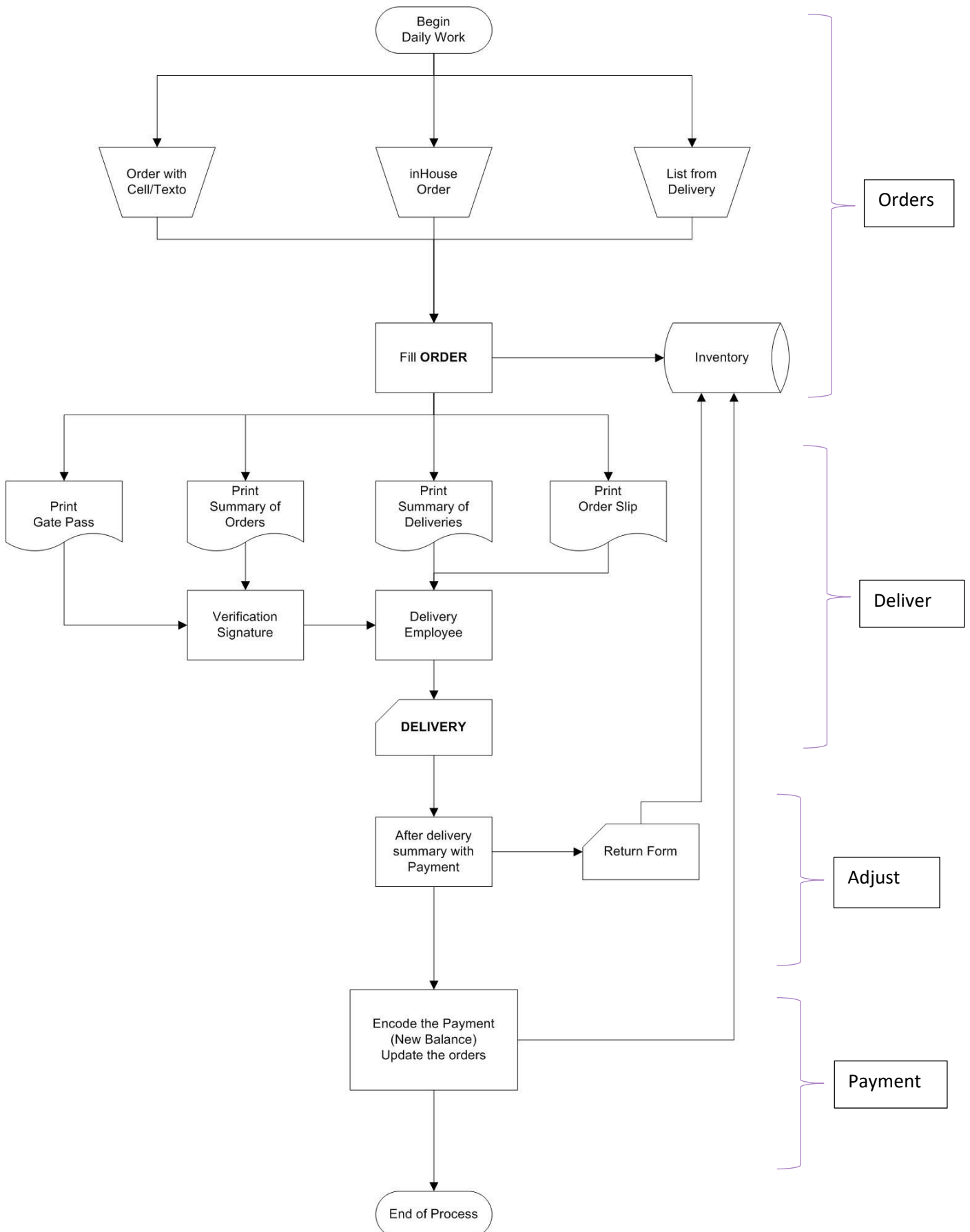
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Work Organization

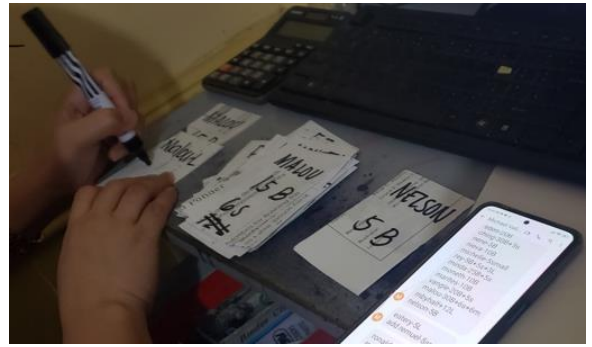
The work is organized around orders that arrive in multiple ways. All orders must be entered into the system as they come. Order slips can be printed individually or depending on the area and the order date.



Step 1 – Encode the orders

Each order will be entered into the system as it comes from textos, cell phone or deliveries reports. I would suggest that you continue to write manually the orders to the factory.

It can be encoded in an Excel sheet like before and at the end of the day, create all orders in POSAM. But I think it will be more effective if you encode directly in the database.



Orders – Add Order

Add Order

Customer	Deliver by	Delivery Date	Order Date	Order No *
Alejo (Mirza A. Alejo) - Silangan - Gumaca	Eleonor Canlas	2023-02-23	2023-02-22	2300045

Item	Qty	Rate	Amount	
(FM003) Fresh Miki Small - Production A - Fresh Products Area	1	40.00	40.00	+
				x

Total40.00

Save
Back

Since the delivery is normally one day later, delivery date will be automatically for tomorrow. You can change the delivery date.

When you press **SAVE**, you get the order updated. You will see the previous balance and amount due. You can modify the order if you need and/or add new items with the +. It's also possible to modify the rate of the item. In this case, the customer will be charged the rate you indicated in the order. You can print the order after updating but I would suggest you wait at the end of the day to print all the orders of the day at the same time. If you wait, the customer can add more items during the day and you won't have to print again the order. If you want to see the details about the customer you can press the icon. You will then be redirected in the customer details. The order will also appear in the order list of the customer and you can press the order to come back to the order.

Update Order

Customer

Alice But
Phone: 09216440736
Area: South
Municipality: Sariaya

Deliver by
Catherine Yagaya

Delivery Date
2023-02-21

Order Date
2023-02-21

Order No
2300042

Item	Qty	Rate	Amount	
(FM002) Fresh Miki Medium - Production A - Fresh Products Area	1	40.00	40.00	+
				x

Total
+ Previous Balance
Amount Due

40.00
4540.00
4580.00

Save
Print
Create New Order
Back

You don't need to save again the order if nothing changed. From here, you can create the next order by pressing **Create New Order**. This would be the normal sequence of creating all the orders.

During the day, you will update the orders of the customer. You can print the summary of orders to help the working sequence on the factory. This summary can be print for a specific area and the extraction is on the order date.

To check if a customer has already placed their order TODAY, you can use the Customer section. A column will tell you if an order has already been placed. You will be able to contact the customer quickly using the telephone number indicated.

You can search quickly a customer by using the Search box. You can enter the name or if you want to work the customer by area, just enter the area. You can change the sorting of data by tapping on the column. So you will quickly see who placed an order or not.

POSAM voyagine									
Customer Home > Customer									
Add Customer									
Show All entries Excel PDF Print Column visibility Search: Silangan									
Customer Name	Code	Type	Area	Municipality	Phone	Order today	Balance	Action	
Alejo (Mirza A. Alejo)	CUS041	Wet Market	Silangan	Gumaca	09701117540	Yes	9200.00		
Emman Peralta	CUS049	Wet Market	Silangan	Gumaca	09511271254	Yes	41635.00		
Jhun (Jhun B. Marcelo)	CUS067	Wet Market	Silangan	Lopez	09632087857	Yes	400.00		
Alma Bella V. Relao	CUS042	Wet Market	Silangan	Gumaca	09394587879	No	0.00		
Ann	CUS084	Wet Market	Silangan	Calauag		No	195.00		

You can modify the orders of the customer from here or update the payments.

Update Customer Home > Customer				
Customer	Orders	Payments	Documents	
Add Order				
Show 10 entries Search:				
Order No	Order Date	Delivery Date	Total	Action
2300033	2023-02-20	2023-02-20	4000.00	
2300032	2023-02-20	2023-02-20	400.00	
Showing 1 to 2 of 2 entries Previous 1 Next				

Step 2 – Print Summary of Orders

Once you have completed the orders for the day, you will be ready to print the Summary of Orders.

Go to Reports – REP06 Summary of Orders

The date of the day will automatically appear but you can change the dates. You can even print the report for many days if it's required.

Reports Home > Reports

Choose the report
 REP06 - Summary of Orders

Location: All Location
 Availability Asset: All Availability
 Area: All Area
 Municipality: All Municipality

Order Date From: 2023-02-22
 Date to: 2023-02-22
 Year: 2023
 Word:

Generate Reset

The report will be given by Area – Municipality with a page break by Area and a total of the items by area.

Reports Home > Reports

Summary of Orders 1 / 3 100% Download Print More

Summary of Orders From :2023-02-14 to 2023-02-21

Customer.	Phone.	Order No	Items
Bonpen			
Agdangan			
Villa		2300039	1 Fresh Miki Medium
Macalelon			
Alona		2300034	100 Lumpia Wrapper Regular 1 Pancit Canton 454g
Unisan			
Aiza		2300033	100 Fresh Miki Big
Aiza		2300032	10 Fresh Miki Big
TOTAL Items for Area Bonpen: 110 Fresh Miki Big 1 Fresh Miki Medium 100 Lumpia Wrapper Regular 1 Pancit Canton 454g			

The last page will have total of items for all areas. You can ask the report for one specific area but in this case, you won't get the total item for all areas.

GRAND TOTAL ITEMS

1225 Fresh Miki Big
 574 Fresh Miki Medium
 1 Fresh Miki Small
 200 Lumpia Wrapper Regular
 120 Mami
 1 Pancit Canton 454g
 213 Pancit Lucban
 50 Salo-Salo Pancit Habhab 250g X 48

Step 3 – Print Summary of Deliveries

The summary of deliveries will be the report for the drivers. You will find all the orders by Area – Municipality. The list of the items, total of the order, previous balance and new balance appears. A zone will be filled by the driver if a payment is given. Like the Summary of Orders, you can extract for a range of dates and for a specific area or all areas. The date of extraction will be Delivery Date.

Summary of Deliveries				From :2023-02-21 to 2023-02-21		
Customer.	Order No	Items	Order Total	Prev Balance	Balance	Payment
Silangan						
Gumaca						
Alejo (Mirza A. Alejo)	2300036	5 Fresh Miki Big	200	9,000	9,200	_____
Emman Peralta	2300040	1000 Fresh Miki Big	40,000	1,635	41,635	_____
Lopez						
Jhun (Jhun B. Marcelo)	2300037	10 Fresh Miki Big	400	0	400	_____
TOTAL			40,600	10,635	51,235	
Items for Area Silangan: 1015 Fresh Miki Big						

You will find in the bottom of the report an Extra items zone where the driver can write who gets extra items. The driver will correct the information like it was done before on the excel sheets. The Outgoing Delivery to be signed by the guard is included in the report.



Extra Items			Outgoing Delivery
Customer	Items	Payment	Date _____
			Time _____
			Guard on Duty _____




REP07 - 2023-02-21 13:02:35 Page 2/3

Step 4 – Print the Order Slips

You will decide if you print or not the order slips when you encode the orders. But if you wish, you can print all order slips by area and also by dates. The order slip will be printed with a page break on each order. The extraction will be on Delivery Date.

Order Slip

1 / 12 | - 100% + |  

Order Slip

Name: Alona
Area: Bonpen
Address: Macalelon -
Phone:

Order No: 2300034
Order Date: 2023-02-20
Delivery Date: 2023-02-20
Deliver by:

Code	Qty	Unit	Item	Price	Amount
LW	100	PCK	Lumpia Wrapper Regular	35.00	3500.00
FN004	1	PCK	Pancit Canton 454g	75.00	75.00
Total:					3575.00
+ Previous Balance:					0.00
Total Amount Due:					3575.00

Buyer Signature: _____

Payment: _____

The last page will give a Summary of orders printed by Area with the total of items for each area.

Order Slip		
Summary of Orders		
Bonpen	110	Fresh Miki Big
	1	Fresh Miki Medium
	100	Lumpia Wrapper Regular
	1	Pancit Canton 454g
Silangan	1015	Fresh Miki Big
South	3	Fresh Miki Medium
	1	Fresh Miki Small

Step 5 – After Delivery Modifications

The driver will bring back the Summary of Deliveries with the modifications. You will need to modify the orders if you want the balance to be calculated by the system. You need also to add the orders given to customer that were not included in the deliveries of the day.

Go to Orders – Find your order using the Order No. Change the data and Save. The balance will be automatically corrected. In the example, the original order was for 10 Fresh Miki Big but finally it was 8. And the customer added 5 Medium.... You need to correct the order first and the balance of the customer will be automatically corrected. Don't forget to SAVE!

Update Order

Customer

Aiza

Phone:

Area: Bonpen

Municipality: Unisan

Deliver by

Catherine Yagaya

Delivery Date

2023-02-22

Order Date

2023-02-22

Order No

2300043

Item	Qty	Rate	Amount	
(FM001) Fresh Miki Big - Production A - Fresh Products Area	8	40.00	320.00	+
(FM002) Fresh Miki Medium - Production A - Fresh Products Area	5	40.00	200.00	x

Total

520.00

+ Previous Balance

5345.00

Amount Due

5865.00

Save

Create New Order

Back

Customer

Orders

Payments

Documents

Customer name *

Aiza

Code

CUS144

TIN

Customer Type

Wet Market

Area *

Bonpen

Municipality

Unisan

Phone

Email

Balance

5865.00

Remark

Step 6 – Payments

The payment received by the driver or any other way, must be inserted in the system.

Go to Customers – Find the customer and update

You will find the balance in the customer tab. You can modify the balance manually if required but this option can be given to a specific profile. Only one person could have the possibility to manually change the balance.

Go to the tab Payment and Add payment. You can indicate the order that cover this payment but it's not compulsory. Most of the time the customer will pay for the balance and not for a specific order. A payment will decrease the balance.

You can also give a credit for items damaged or for any reason you can indicate in the Remark. A credit will decrease the balance and you will keep the information about the credit given.

You can't modify a payment. Delete the payment and create a new one.

Update Customer Home > Customer

Customer Orders **Payments** Documents

[Add Payment](#)

Show 10 entries Search:

Date	Amount Paid	Type	Remark	Order	Action
2023-02-21	375.00	Payment			
2023-02-21	1000.00	Credit	Item damaged	2300034	

Showing 1 to 2 of 2 entries Previous 1 Next