How to Use Sales Order Dashboard (SOD)

This guide explains the key functions of the **Sales Order Dashboard (SOD)**, used at SVS to search, track, and manage orders.

Link: http://phoenix.svs.co.nz:9080/erp/oe/i_order/i_order.php?from=menu

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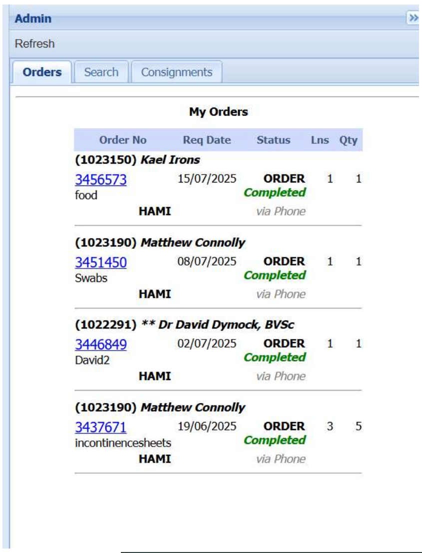
Section 1: Understanding the Admin Container

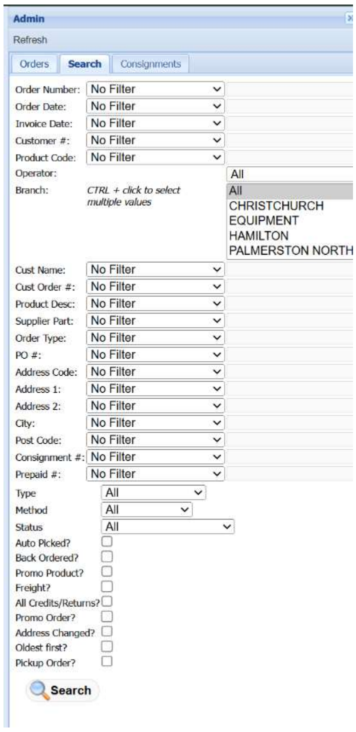


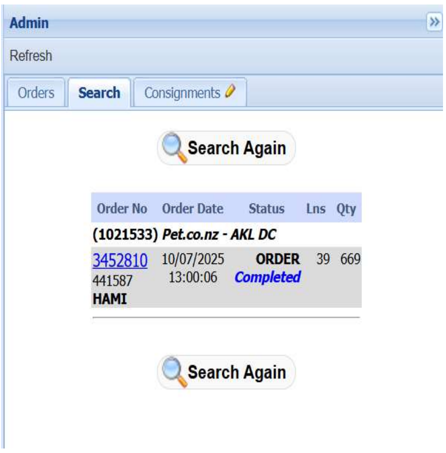
Where to Look

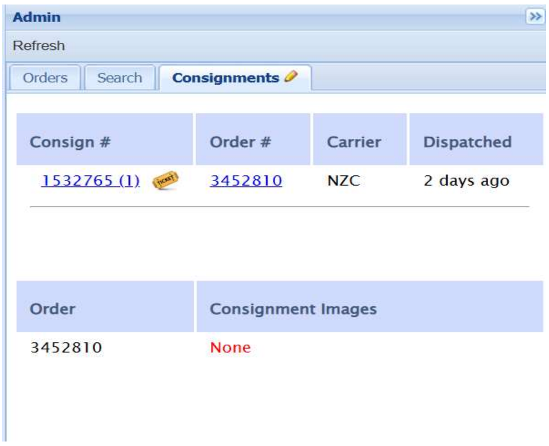
- The **right-hand container** on the SOD screen is called **"Admin"**.
- This is where you **search for orders**.

Tabs Explained

- **Orders (First Tab):**
  - Before you search, this shows a list of previously keyed orders **by yourself**.
  - After you search for an order, the results will also appear here.
  - Click on the **blue hyperlink** of the order number to open the order in the **centre container** called **"Sales Order Maintenance"**.
- **Search (Second Tab):**
  - This is where you search for specific orders.
  - You can search by multiple fields but the **main ones used by supervisors are:**
    - **Order Number:** Internal SVS order number.
    - **Cust Order #:** Customer's order reference.
    - **Consignment #:** Carrier consignment number.
- **Consignments (Third Tab):**
  - This tab is **empty** until you search for an order.
  - After a search, it displays **all consignments** associated with the searched order.
  - If the **carrier is NZC**, you can **click on the consignment** to open the **NZC tracking site** directly.

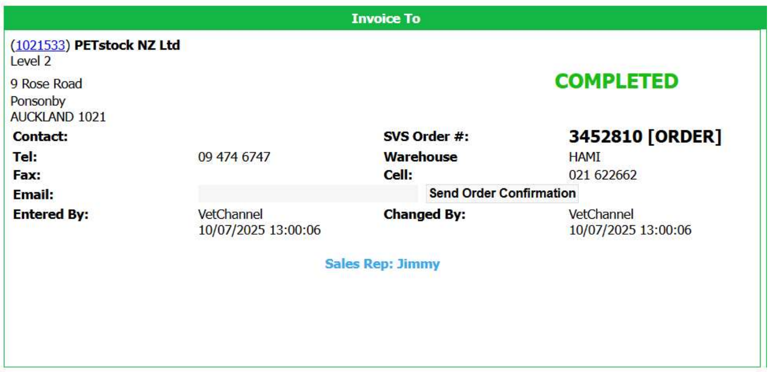






Section 2: Centre Container – Sales Order Maintenance

When you click on an order from the **Orders tab**, it opens in the **centre container** called **"Sales Order Maintenance"**.

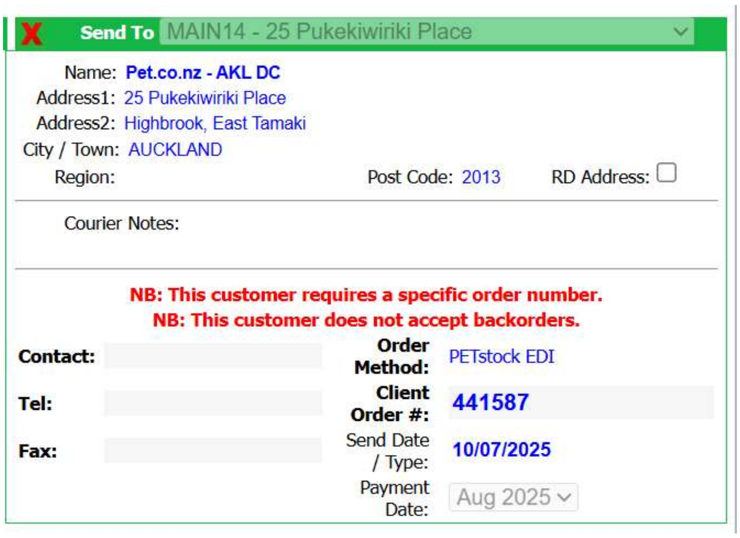


Key Sections Displayed:

Invoice To Section

- Customer ID
- Customer Name
- Address
- Contact Number
- Email
- Entered By and Date
- SVS Order Number
- Warehouse
- Cell
- Changed By and Date (only updated at the request of management)

Send To Section



- Information that prints on the shipping label:
  - Name
  - Address
  - City/Town
  - Region
  - Post Code

- RD Address (Yes/No)
- Contact
- Telephone
- Fax
- Order Method
- Client Order Number
- Send Date / Type
- Payment Date

Products Section

- Includes:
  - Notes (item-specific)
  - Warehouse
  - Item Code
  - Product Description
  - Quantity Ordered
  - Back Order
  - Sent
  - Discount
  - Unit Price
  - Total Price

Del	Ty / Stg	Wh	Code	Product Description	Qty Ordered	No Charge Qty	Back Order	Sent	Disc	Unit Price	Total Price
	EDI / CAN	HAMI	13164	Breeder Celect Litter (12kg) 30L	326	0	0	0	11.3%	26.56	0.00
	EDI / INV	HAMI	17637	Hills Feline Senior Vitality 7+ 2.72kg	4	0	0	4	4.0%	55.86	223.45
	EDI / INV	HAMI	1771	Hills Canine Adult Small Bites 6.8kg	2	0	0	2	4.0%	79.08	158.17
	EDI / INV	HAMI	16201	Hills Canine Adult Small Paws 1.5kg	2	0	0	2	4.0%	28.88	57.75
	EDI / INV	HAMI	17797	Hills Canine Sen/Stomach & Skin 12kg	15	0	0	15	4.0%	134.95	2,024.21
	EDI / CAN	HAMI	1828	Back 2 Nature Animal Bedding 30L	8	0	0	0	31.8%	26.56	0.00
	EDI / INV	HAMI	17920	Hills Canine Healthy Mobility 12kg	2	0	0	2	4.0%	134.95	269.89
	EDI / INV	HAMI	18895	Hills Canine Sen/Stomach & Skin L/B 13.6kg	2	0	0	2	4.0%	150.63	301.27
	EDI / INV	HAMI	18896	Hills Feline Perfect Weight 6.8kg	2	0	0	2	4.0%	112.35	224.70
	EDI / INV	HAMI	18897	Hills Feline Sen/Stomach & Skin 7.03kg	2	0	0	2	4.0%	112.35	224.70
	EDI / INV	HAMI	19161	Hills Canine Derm Complete 10.89kg	2	0	0	2	4.0%	165.03	330.07

Pricing Summary (Bottom of Page)

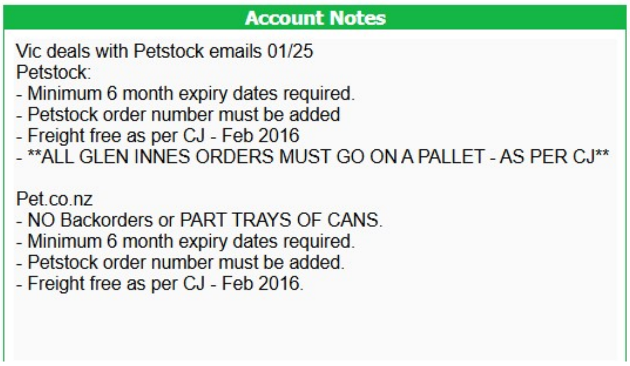
- Sub Total
- Freight
- GST
- Total

Sub Total:	**13,567.53**
Freight:	0.00
GST:	**2,035.13**
Total:	**15,602.66**

Account Notes Section

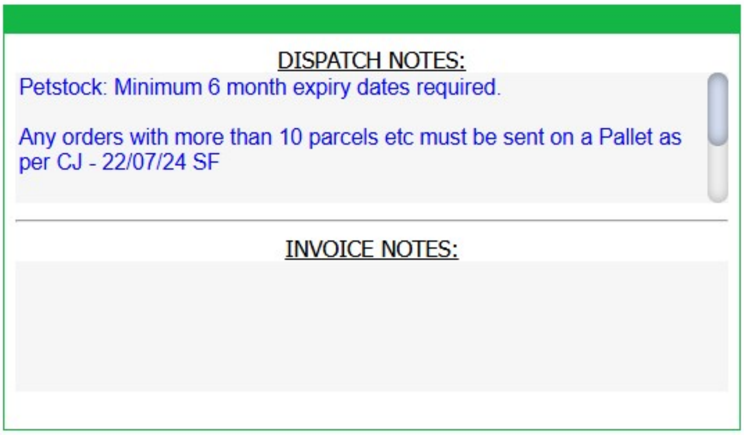
- General account-related notes attached to the customer account.

- **It can be very helpful**



Notes Section

- Includes:
    - **Dispatch Notes** – specific instructions for warehouse/dispatch team.
    - **Invoice Notes** – notes that print on the customer invoice.

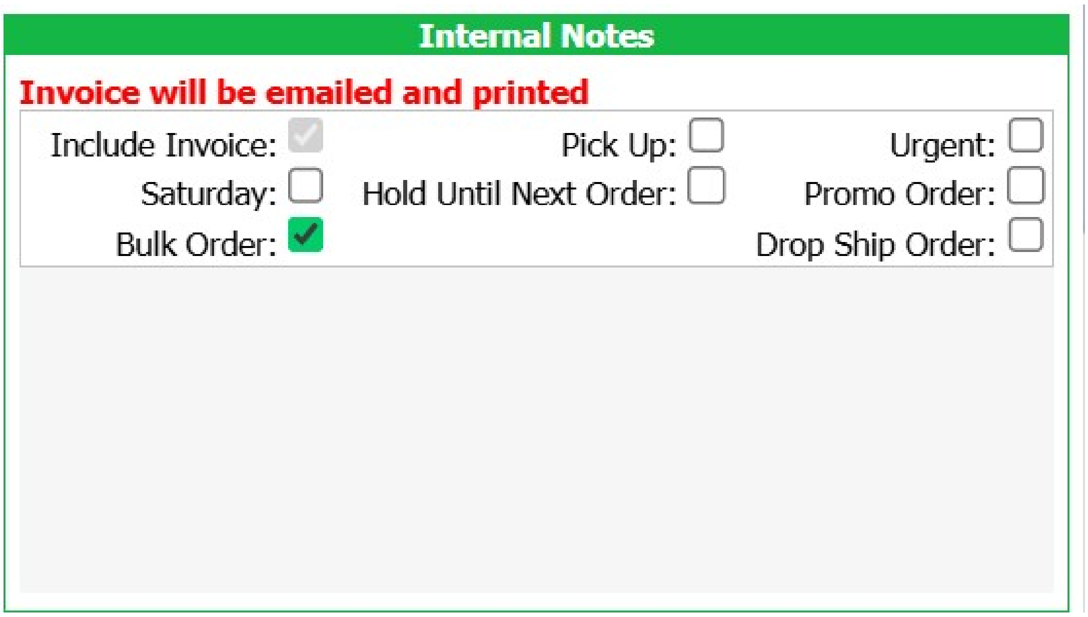


Internal Notes Section

- Internal-use only notes **not shown to customers**.
- Contains:
    - **Internal Notes Input Box** – used for internal comments.
    - **Tick Boxes** (generally not used by supervisors):
        - Include Invoice
        - Saturday
        - Bulk Order
        - Pick-Up
        - Hold Until Next Order
        - Urgent

        - Promo Order
        - Drop Ship Order

Supervisors **do not need to adjust the tick boxes** unless instructed by management.



Section 3: Top Bar Buttons and Options in Centre Container

At the **top of the Centre Container**, there are **buttons and selection options** used for order management:

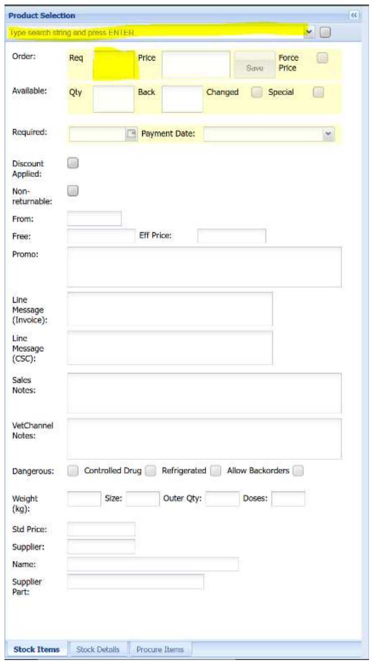
- **Select a Customer:**
    - Opens just the customer details without loading a specific order.
- **Warehouse Dropdown:**
    - Allows you to select or change the warehouse assigned to the order.
- **Save Button:**
    - Saves any edits or changes made to the order.
- **Finalise Button:**
    - Finalises the order, **pushing it to the main order allocation dashboard for picking**.
- **Options Dropdown:**
    - Contains additional features and tools (explained in the next section).

- **View Order Button:**
    - Lets you view the full order confirmation.
- **Reload Button:**
    - Refreshes the order page to load any updates.
- **Cancel Button:**
    - Cancels the order (only use when required).

Section 4: Left Panel – Adding Items to an Order

- The **left-hand panel** is used when **adding an item** to an order.
- At the **top of the left panel**, there is a **dropdown menu** where you can **search for items**.
- After searching and selecting the required item, click the **"i" icon** to open the **item input box**.
- In this section, you can:
    - Enter the **quantity** the customer wants.
    - Adjust the **price** (if authorised to do so).

Note: Price adjustments should only be made with approval from management.



Section 5: How to Manually Key an Order (e.g., Staff Orders for Internal Purchases)

Manual orders are usually keyed for **internal staff purchases** (e.g., staff buying food at staff pricing).

Steps to Manually Key an Order:

1. **Search for the Customer:**
    - Use the **Search tab** in the **Admin container** to search for the staff member (internal customer).
2. **Enter Client Order #:**
    - In the **Send To section**, enter a **Client Order #** (e.g., EmployeeCatFood).

- **Important:** Press the **Enter key** after entering the Client Order # to create the order.

3. **Confirm the Warehouse:**
    - Before adding items, use the **Warehouse Dropdown** (top of Centre Container) to select the correct warehouse:
        - Example: For **Hamilton staff**, select **Hamilton Warehouse**.
4. **Add Items to the Order:**
    - Use the **Left Panel** to search for products.
    - Click the **"i" icon**, enter the **quantity** required, and adjust pricing if applicable (with authorisation).
5. **Finalise the Order:**
    - Once products are added and checked, click the **Finalise Button**.
    - The order will be pushed to the **Order Allocation Dashboard** for picking.

Tip: Double-check all details before finalising, especially warehouse selection and the products being ordered.

Another thing is products that people can't purchase unless they have a specific license to buy e.g. prescription food, the system won't let you buy it so you don't have to worry about keying products you shouldn't supposed to.

Section 6: How to Use Internal Notes

The **Internal Notes** section is useful for recording extra details about the order that are **not visible to customers** but help internal teams understand any adjustments or missing actions.

Example Use Case – Scanning Missed Tickets:

If a worker **forgets to scan in a Rural ticket or Dangerous Goods (DG) ticket** into the app, you should document it in the Internal Notes section like this:

- Format:
  [Ticket Type] [Ticket Number] [Your Initials] [Date]

Examples:

- RD 06585090 KW 10/07/25 → Rural Delivery ticket not scanned.
- DG 08875032 KW 10/07/25 → Dangerous Goods ticket not scanned.

Explanation:

- RD = Rural Delivery
- DG = Dangerous Goods
- KW = Your initials
- 10/07/25 = Date the note was entered

This ensures there is a **permanent note** on the order explaining missing scan tickets, which helps track and resolve any discrepancies.

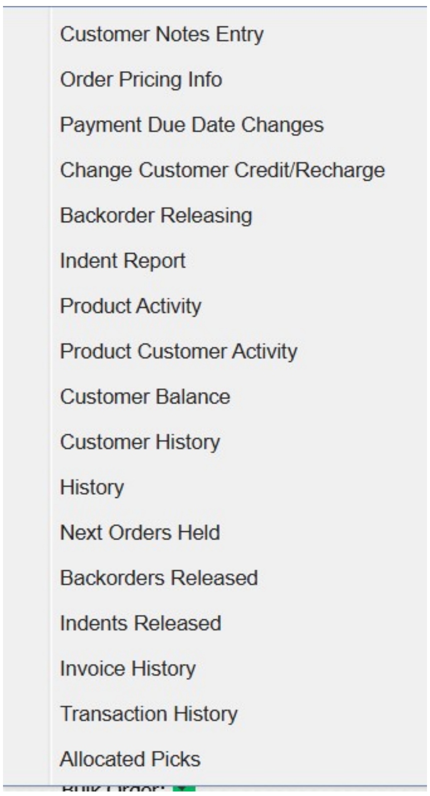
Section 7: Options Dropdown Overview

The **Options Dropdown** (shown below) contains multiple tools to view more detailed information about customers, orders, and order history.

Although most options are self-explanatory, here are the key ones supervisors should be aware of:

📊 Important Options Explained:

- **History:**
  - Displays a **timeline diagram** showing the order's full progress: from being placed, picked, packed, to dispatched.
  - Also shows issues such as **under supply, over supply, wrong supply**, and other adjustments to the order.
- **Invoice History:**
  - Shows **who picked and packed** the order.
  - Displays:
    - **Picker's name**
    - **Pick times**
    - **Warehouse location**
    - **Invoice number**
    - **Address**
    - **Number of parcels sent**



- **Transaction History:**
    - Provides a **log of events** on the order, including:
        - Creation time
        - Allocation and un-allocation events
        - Sending details
    - **Example Transaction History:**
    - 10/07/2025 01:00pm Sales Order 3452810 created via EDI
    - 11/07/2025 06:01am Allocated to picker in HAMI by supervisor
    - 11/07/2025 07:23am Un-allocated from picker in HAMI by supervisor
    - 14/07/2025 12:33pm Allocated to another picker in HAMI by supervisor
    - 14/07/2025 06:58pm Sent from HAMI on pick ticket 2238465 by picker

Tip: These tools are useful for troubleshooting order issues, checking progress, and confirming if picking errors occurred.

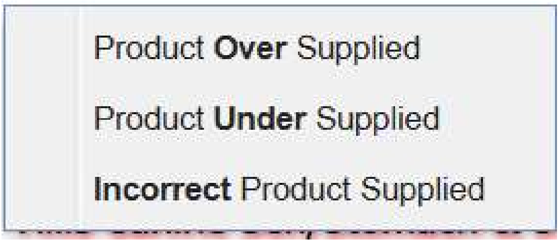
Section 8: How to Mark a Product as Over Supplied, Under Supplied, or Incorrect Supplied

Sometimes, it is necessary to manually adjust an order to indicate **over supply, under supply, or incorrect supply** on specific products.

Steps to Update Product Supply Status:

1. **Search for the Order:**
    - Use the **Search tab** in the **Admin container** to locate the relevant order.
2. **Find the Product in the Order:**
    - Scroll through the **Products Section** in the **centre container** to locate the item you need to update.
3. **Open Product Options:**
    - **Double-click the product description** of the item you want to adjust.
    - This will open additional options.

4. **Select the Desired Supply Status:**
    - Choose either **Over Supplied**, **Under Supplied**, or **Incorrect Supplied** from the list of options.



5. **Enter the Quantity:**
    - Input the **amount** relevant to the adjustment.
6. **Save Your Changes:**
    - Use the **Save button** at the top of the page to ensure the update is applied to the order.

Important: These adjustments help document discrepancies in stock fulfilment and assist in audit trails for warehouse performance.