

# 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](http://phoenix.svs.co.nz:9080/erp/oe/i_order/i_order.php?from=menu)

## 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.

Order No	Req Date	Status	Lns	Qty
(1023150) <a href="#">Kael Irons</a> <a href="#">3456573</a> food	15/07/2025	ORDER Completed	1	1
HAMI via Phone				
(1023190) <a href="#">Matthew Connolly</a> <a href="#">3451450</a> Swabs	08/07/2025	ORDER Completed	1	1
HAMI via Phone				
(1022291) <a href="#">** Dr David Dymock, BVSc</a> <a href="#">3446849</a> David2	02/07/2025	ORDER Completed	1	1
HAMI via Phone				
(1023190) <a href="#">Matthew Connolly</a> <a href="#">3437671</a> Incontinencesheets	19/06/2025	ORDER Completed	3	5
HAMI via Phone				

Admin

Refresh

Orders Search Consignments

Order Number: No Filter

Order Date: No Filter

Invoice Date: No Filter

Customer #: No Filter

Product Code: No Filter

Operator: All

Branch: CTRL + click to select multiple values

Cust Name: No Filter

Cust Order #: No Filter

Product Desc: No Filter

Supplier Part: No Filter

Order Type: No Filter

PO #: No Filter

Address Code: No Filter

Address 1: No Filter

Address 2: No Filter

City: No Filter

Post Code: No Filter

Consignment #: No Filter

Prepaid #: No Filter

Type: All

Method: All

Status: All

Auto Picked? ☐

Back Ordered? ☐

Promo Product? ☐

Freight? ☐

All Credits/Returns? ☐

Promo Order? ☐

Address Changed? ☐

Oldest first? ☐

Pickup Order? ☐

Search

Admin
Refresh
Orders
Search
Consignments

Order No	Order Date	Status	Qty
3457216 PNTH	16/07/2025	ORDER - ORD ORD - PIC	50
3457215 PNTH	16/07/2025	ORDER - ORD ORD - ORD	56
3457214 PNTH	16/07/2025	ORDER - ORD ORD - PIC	49
3455347 PNTH	14/07/2025	ORDER - COM INV - INV	42
3455346 CHCH	14/07/2025	ORDER - COM INV - INV	95
3455345 HAMI	14/07/2025	ORDER - ORD ORD - ORD	86
3455344 CHCH	14/07/2025	ORDER - COM INV - INV	88

Admin
Refresh
Orders
Search
Consignments

Search Again

Order No	Order Date	Status	Lns	Qty
(1021533) Pet.co.nz - AKL DC				
3452810	10/07/2025	ORDER	39	669
441587	13:00:06	Completed		
HAMI				

Search Again

Admin
Refresh
Orders
Search
Consignments

Consign #	Order #	Carrier	Dispatched
1532765 (1)	3452810	NZC	2 days ago

Order	Consignment Images
3452810	None

## 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

Invoice To

(1021533) PETstock NZ Ltd  
Level 2  
9 Rose Road  
Ponsonby  
AUCKLAND 1021  
Contact:  
Tel: 09 474 6747  
Fax:  
Email:  
Entered By: VetChannel  
10/07/2025 13:00:06

SVS Order #: 3452810 [ORDER]  
Warehouse: HAMI  
Cell: 021 622662  
Send Order Confirmation  
Changed By: VetChannel  
10/07/2025 13:00:06  
Sales Rep: Jimmy

COMPLETED

Send To MAIN14 - 25 Pukekiwiri Place

Name: Pet.co.nz - AKL DC  
Address1: 25 Pukekiwiri Place  
Address2: Highbrook, East Tamaki  
City / Town: AUCKLAND  
Region: Post Code: 2013 RD Address:

Courier Notes:

NB: This customer requires a specific order number.  
NB: This customer does not accept backorders.

Contact: Order Method: PETstock EDI  
Tel: Client Order #: 441587  
Fax: Send Date / Type: 10/07/2025  
Payment Date: Aug 2025

- 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	<a href="#">13164</a>	Breeder Select Litter (12kg) 30L	326	0	0	0	11.3%	26.56	0.00
	EDI / INV	HAMI	<a href="#">17637</a>	Hills Feline Senior Vitality 7+ 2.72kg	4	0	0	4	4.0%	55.86	223.45
	EDI / INV	HAMI	<a href="#">1771</a>	Hills Canine Adult Small Bites 6.8kg	2	0	0	2	4.0%	79.08	158.17
	EDI / INV	HAMI	<a href="#">16201</a>	Hills Canine Adult Small Paws 1.5kg	2	0	0	2	4.0%	28.88	57.75
	EDI / INV	HAMI	<a href="#">17797</a>	Hills Canine Sen/Stomach & Skin 12kg	15	0	0	15	4.0%	134.05	2,024.21
	EDI / CAN	HAMI	<a href="#">1828</a>	Back 2 Nature Animal Bedding 30L	8	0	0	0	31.8%	26.56	0.00
	EDI / INV	HAMI	<a href="#">17920</a>	Hills Canine Healthy Mobility 12kg	2	0	0	2	4.0%	134.05	269.89
	EDI / INV	HAMI	<a href="#">18895</a>	Hills Canine Sen/Stomach & Skin L/B 13.6kg	2	0	0	2	4.0%	150.63	301.27
	EDI / INV	HAMI	<a href="#">18896</a>	Hills Feline Perfect Weight 6.8kg	2	0	0	2	4.0%	112.35	224.70
	EDI / INV	HAMI	<a href="#">18897</a>	Hills Feline Sen/Stomach & Skin 7.03kg	2	0	0	2	4.0%	112.35	224.70
	EDI / INV	HAMI	<a href="#">19161</a>	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:	<b>13,567.53</b>
Freight: <input type="checkbox"/>	0.00
GST:	<b>2,035.13</b>
<b>Total:</b>	<b>15,602.66</b>

### Account Notes Section

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

- **It can be very helpful**

Account Notes
Vic deals with Petstock emails 01/25 Petstock: - Minimum 6 month expiry dates required. - Petstock order number must be added - Freight free as per CJ - Feb 2016 - <b>**ALL GLEN INNES ORDERS MUST GO ON A PALLET - AS PER CJ**</b>
Pet.co.nz - NO Backorders or PART TRAYS OF CANS. - Minimum 6 month expiry dates required. - Petstock order number must be added. - Freight free as per CJ - Feb 2016.

### Notes Section

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

Notes
<p><u>DISPATCH NOTES:</u></p> <p>Petstock: Minimum 6 month expiry dates required.</p> <p>Any orders with more than 10 parcels etc must be sent on a Pallet as per CJ - 22/07/24 SF</p>
<p><u>INVOICE NOTES:</u></p>

### 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.

**Internal Notes**

**Invoice will be emailed and printed**

Include Invoice: <input checked="" type="checkbox"/>	Pick Up: <input type="checkbox"/>	Urgent: <input type="checkbox"/>
Saturday: <input type="checkbox"/>	Hold Until Next Order: <input type="checkbox"/>	Promo Order: <input type="checkbox"/>
Bulk Order: <input checked="" type="checkbox"/>	Drop Ship Order: <input type="checkbox"/>	

### Section 3: Top Bar Buttons and Options in Centre Container

Sales Order Maintenance

Select a Customer

HAMILTON

Save
 Finalise
 Options ▾
 Set DIRECT
 View Order
 Reload
 Cancel

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).

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## 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.

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## 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.

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## 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.

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## 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**

Customer Notes Entry
Order Pricing Info
Payment Due Date Changes
Change Customer Credit/Recharge
Backorder Releasing
Indent Report
Product Activity
Product Customer Activity
Customer Balance
Customer History
History
Next Orders Held
Backorders Released
Indents Released
Invoice History
Transaction History
Allocated Picks



- **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.

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## 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:**

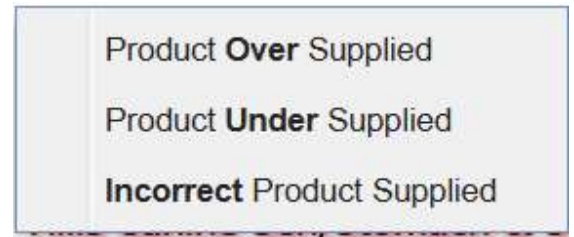
- Scroll through the **Products Section** in the **centre container** to locate the item you need to update.

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.



Product **Over** Supplied

Product **Under** Supplied

**Incorrect** Product Supplied

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.