

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

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.

The screenshot shows two views of the Admin container. The top view shows the 'Orders' tab selected, displaying a list of 'My Orders' with columns for Order No, Req Date, Status, Lns, and Qty. The bottom view shows the 'Search' tab selected, displaying a search interface with various filter dropdowns and a 'Search' button.

Orders Tab (Top):

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

Search Tab (Bottom):

Search filters include:
Order Number, Order Date, Invoice Date, Customer #, Product Code, Operator, Branch, Cust Name, Cust Order #, Product Desc, Supplier Part, Order Type, PO #, Address Code, Address 1, Address 2, City, Post Code, Consignment #, Prepaid #, Type, Method, Status, Auto Picked?, Back Ordered?, Promo Product?, Freight?, All Credits>Returns?, Promo Order?, Address Changed?, Oldest first?, Pickup Order?.
A 'Search' button is located at the bottom right.

The first screenshot shows the 'Orders' tab with a list of orders. The second screenshot shows search results for 'Pet.co.nz - AKL DC'. The third screenshot shows a detailed view of a consignment with status 'Completed'.

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)

Invoice To	
(1021533) PETstock NZ Ltd Level 2 9 Rose Road Ponsonby AUCKLAND 1021	
Contact:	SVS Order #:
Tel:	Warehouse
Fax:	Cell:
Email:	<input type="checkbox"/> Send Order Confirmation
Entered By:	Changed By:
VetChannel 10/07/2025 13:00:06	VetChannel 10/07/2025 13:00:06
Sales Rep: Jimmy	
COMPLETED	

Send To Section

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

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: <input type="checkbox"/>	
Courier Notes:	
NB: This customer requires a specific order number.	
NB: This customer does not accept backorders.	
Contact:	Order Method: PETstock EDI
Tel:	Client 441587
Fax:	Order #: 441587
	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	13164	Breeder Select Litter (12kg) 30L	326	0	0	0	11.3%	26.56	0.00
	EDI / INV	HAMI	17632	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:	<input type="checkbox"/> 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**

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 - **ALL GLEN INNES ORDERS MUST GO ON A PALLET - AS PER CJ** 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.

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

Internal Notes Section

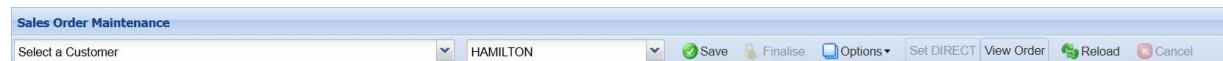
- Internal-use only notes **not shown to customers**.
- Contains:
 - **Internal Notes Input Box** – used for internal comments.
 - **Tick Boxes** (generally not used by supervisors):
 - Include Invoice
 - Saturday
 - Bulk Order
 - Pick-Up
 - Hold Until Next Order
 - Urgent

- 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:			

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).
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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.

The screenshot shows a software interface titled 'Product Selection'. It includes fields for 'Order' (Req, Price), 'Available' (Qty, Back, Changed, Special), 'Required' (Payment Date), 'Discount Applied', 'Non-returnable', 'From', 'Free', 'Eff Price', 'Promo', and several message and sales notes sections. At the bottom are buttons for 'Stock Items', 'Stock Details', and 'Procure Items'.

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**

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.

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.

Product **Over** Supplied
Product **Under** Supplied
Incorrect Product Supplied

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