

How to create a multiple order schedule

This functionality is used to create multiple copies of an order without having to manually re-enter every time

From the Sales Order:

click "Create Multiple Order Schedule" icon in the header row. This opens a dialogue box prompting how many

Populate no of copies required

Click OK

This opens up the dialogue box prompting you to enter the delivery dates and document numbers of the copies

Populate Estimated delivery dates required for each order

Populate External Document no. for each order

Click "Process Orders" icon on the header row – DON'T click "OK" at the bottom right or it will close without saving

Finish each order as needed.

Note:

When using this process to repeat previously placed orders check the pricing against CRM because this may change

When processing the monthly rolling orders, also check existing rolling orders against CRM because the pricing may change

Final Checks – if the order being copied has already had haulage arranged.

If you have copied an order that has already had haulage assigned the following steps must be completed on the copied order

In the Lines tab:

Clear the "Special Order Purchase no." box – DO NOT drill through & delete the PO entirely, only delete what you don't want

Clear the "Special Order Purch. Line No." box

Delete delivery line.

In the Shipping & billing tab:

Update the shipping agent

Untick the printed box

Clear the date printed box

Untick confirmation printed box

Clear the date confirmation box