

Open Order Reports/Orders on Hold

OPEN ORDER REPORTS - DISTRIBUTION

Delete:

- Column A, B, C
- Payer and Additional Partner
- Incoterms and Plant Name
- Open Indicator, MSP Category, Material
- Usage Desc, Gross Weight, Weight Unit

Highlight document and filter:

- Net Value – uncheck all zeros and HIDE column. (sometimes this one will uncheck after next filter, so go back and check that only zeros are unchecked before hiding)
- Invoice Quantity – Only keep the zeros checked, then hide
- Hide MSP Invoice Quantity

Sort:

- Last G/I Date (when it ships), oldest to newest
- Name 2, A to Z
- Name of Ship to Party, A to Z

Create Distribution Tabs:

- Choose each Distributor/Direct Contractor from sold to tab
- Filter by each distributor and paste info to dedicated tab
 - ABC East 402 (Warren)
 - ABC West 015 (Grand Rapids)
 - QXO East 285 (Rochester Hills)
 - QXO West 228 (Grand Rapids)
 - Bloom – Direct (if there is data)
 - Christen Detroit – Direct (if there is data)
- On each Distribution tab, separate by individual contractors.
 - Add two blank lines above each contractor
 - Merge, center, and yellow highlight columns G and H on the blank line directly above each contractor. Add specific contractor name to that merged space

ORDERS ON HOLD

Add 2 tabs for Orders on Hold which will include one tab for ABC (east and west) and QXO (east and west).

- Filter Base Sheet by ABC (east and west)
- Transfer any info from base sheet that has line information included on the Delivery Block Description Tab
- Separate East and West on new tab using a red line.
- Separate each job with a blank white line.
- Highlight Delivery Block description tab yellow.
- Do all above steps again for QXO tab (east and west)

OPEN ORDER REPORTS - CONTRACTORS

Create new tabs for each contractor that has more than a few line items in the separated distribution tabs. The only exception is if a contractor has only a few line items under one distribution partner but multiple with another distribution partner. In this case, a tab would be created for both.

- Copy and paste all corresponding/relevant info from distribution tab to contractor tab.
- Delete the following columns from contractor tab
 - City of Ship To
 - Region of Ship to
 - Delivery Block Description
- Separate contractor jobs with two blank lines
 - Merge, center, and yellow highlight columns G and H on the blank line directly above each job. Add specific job name to that merged space

Once all of the above is completed, Print (to PDF) each tab. Remember to change portrait orientation to landscape, custom margins to narrow, and scale to fit all columns on one page. Print each and save to one drive as date, distributor/contractor name. For example, 7-29 ABC East Open Order Report, 7-29 JD Candler Open Order Report – QXO, or QXO Orders on Hold – East & West. Email reports to associated distribution partners and contractors.

Bryan Verwys at QXO always gets an excel version of the east and west reports.

Arrow asks for delivery date column to be added.