

Order Team Stand point

1. Modifying an order after it was confirmed:

Note: This is what ABM boss used to help with, it was quite helpful and saves a lot of time. Here are the different scenarios:

- a. Wrong pricing on order: being able to change the price of an item after the order was processed.
- b. Adding an item: It happens that some customer request to add products or remove some after the original order was placed. As of now, we just place a separate order and add it together with the first one. Being able to modify the order would be useful.
- c. Removing an item: Sometimes customer will order 1 too many items or would like to remove an item after the order was placed. This is already available and is quite helpful.
- d. Changing the quantity of an item: As mentioned above, however, we can only delete a whole item line and not simply change quantity. Eg. go from 2 items to 1 item.

2. Automatic PDF creation:

There are two scenarios in which this would be useful for order team:

- a. VERY IMPORTANT: When sending an invoice to a customer, the “ send -email button” sends a text format invoice. These are almost never accepted by the customer and we therefore have to go back and print as PDF and manually send each invoice to each customer. It would be really helpful if the “send email” button on the invoice page directly sent a PDF invoice to the end-user.
- b. NOT AS IMPORTANT: Same description as above but for order confirmation. There are fewer complaint about this so I would not consider this to be as important, but PDF confirmations seems to be more preferred by customers.

3. Order Page Filters

When we reach this page: <https://www.abmgood.com/admin/sales/order/>

It would be helpful if a filter to search by email was added. Currently, when a customer asks for information about a previous order, the route we go through is:

Customer → Filter by email → See customer → Orders → find the order the customer is referring to.

Ideally, if we could search by email directly in the order page, it would cut down a few steps.

4. Changing Orders automatically changes Invoice.

When making modifications to an order, it would be ideal if the invoice associated with this order automatically adjusted itself to reflect what is on the order. This is mainly regarding price, so that when an order becomes modified, the price on the invoice reflects that modification. Right now we have to manually edit the invoice after making changes to the order.

5. PO #s vs Credit Card.

When distributors or end-users that are on prepayment terms use POs to place orders (mybiosource is the main one), they send us a PO. We then add the credit card information to process payment. However, later on, if we are looking back into orders and searching by PO#, we cannot find the order that it does not appear since the credit card information overwrote the "Purchase Order" section. If possible, it would help if that PO# could somehow stay on the order as well as the credit card information to make our search quicker.