POET Everyday Instructions

System Overview

The POET system is used to manage customer interactions, order processing, and communications within Fedway. Below are detailed instructions on how to perform essential tasks using the POET system.

Daily Operations

Steps for Every Morning

- **Task:** Initialize system updates.
- **Steps:**
    1. Open POET.
    2. Click the `Communications` tab.
    3. Click `Call Host`.
    4. The `Ai2 Connection Manager` will open, download and process updates, and close when completed.

Customer Management

Stepf for Setting an Active Customer

- **Task:** Set a customer as active.
- **Steps:**
    1. Click the `Work With` tab.
    2. Click `Orders`.
    3. To set a Customer as Active:
        - **Option A:** In 'Enter Customer Search', type the name/number of a Customer and press `Enter` to search. Then, either press `Enter` OR double-left-click the line.
        - **Option B:** Use your mouse to navigate and double-left-click the line of the Customer.
    4. If done correctly, the Customer will display in the title bar of POET as:

        `[###### CUSTOMERNAME] - (F)edway (A)utomated (S)ales (T)ransactions`

Communication and Order Processing

Steps for Sending an Order

- **Task:** Send the completed order.
- **Steps:**
    1. Click the `Communications` tab.
    2. Click `Send Orders and Files`.
    3. The `Ai2 Connection Manager` will open to send all 'R' status orders, and close after they've been sent.
    4. After a minute, click `Communications->Call Host`.
    5. The `Ai2 Connection Manager` will open to receive any Printbacks, and close after they've been received.

Steps for Verifying an Order

- **Task:** Verify the sent order.
- **Steps:**
    1. Click the `Work With` tab, then click `Orders`.
    2. Click `Order Log`.
    3. The `Order Log` will open, displaying all orders.
    4. Locate the order that was sent and verify that it has a 'P' in the `S/T` column.
    5. Highlight the line and click `Reports (F2)` to view the Printback.
    6. Click `Close (F4)` to close the Printback.
    7. Click `Close (F4)` to close the `Order Log`.