

TOOL USER GUIDE

ORDER MANAGER



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OVERVIEW

The Order Manager tool streamlines the creation and management of various order types, such as purchasing and sales orders, by allowing users to easily set up customisable templates. It facilitates direct communication with suppliers, enabling collaborative order management and real-time updates. By automating key processes, the tool significantly reduces manual work and enhances overall efficiency in order handling.

FEATURES INCLUDE:

- Quickly set up customisable templates for different order types
- Templates can be designed based on various criteria
- Share orders with suppliers/customers for collaborative viewing, completion, response, amendments and finalisation
- Generate single/multiple orders by inputting details, parameters and product information
- Options to issue orders as pre-confirmed or negotiation orders for flexibility.
- View historical and future orders easily through dedicated tabs
- Filter orders by type, date, product category, status, and more.
- Standardises data capture for improved information quality
- Automatically processes quantities and generates pricing linked to pricing grids using a smart pricing tool

1. INITIAL SETUP FOR ORDER TEMPLATES

1.1 ADMIN SECTION

This is the section that allows you to change administration settings for your order templates. It includes how to categorise order numbers, multi order drafts and supplier / product links.

Step 1: Sign in and go to *Order Tool* under Trading and planning then select 'Order Templates'.

The screenshot displays the 'Order Manager' interface. At the top, there is a navigation bar with tabs for 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. The 'Trading & Planning' tab is active. Below this, the 'Order Manager' header is visible, with sub-tabs for 'Templates', 'Sent Orders', and 'Received Orders'. The 'Templates' sub-tab is selected. On the right side, a navigation menu is open, showing three main categories: 'Purchasing Tool', 'Sales Tool', and 'Order Tool'. Under 'Order Tool', 'Order Templates' is highlighted in blue. Other options under 'Order Tool' include 'Sent Orders', 'Received Orders', and 'Activity Overview'. Below the navigation menu, there are sections for 'Purchasing Tool', 'Sales Tool', and 'Planning Tool', each with a list of sub-options. At the bottom, there is a table with columns for 'Last Updated', 'Site', 'Order Type', and 'Product Ty'. The table contains one row with a checkbox in the first column.

Step 2: Follow the steps above then select the admin function on the right side of the tool bar, and you will have 5 options to categories to select under this heading. These will be general, confirmation names, auto finalise, order lists optional and order view configuration. Only users with admin access to the order manager will have accessibility (this can be edited in the settings section under 'Manager Users').

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ ? ⚙

Order Manager

Templates Multi Order Drafts → Sent Orders ← Received Orders Activity ▾ Admin

General

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Setting	Option
Order Numbers <i>Manual entry - A order number must be manually entered when issuing an order</i> <i>Auto-generated - An order number will be automatically generated by Foods Connected</i> <i>From reserved list - An order number will be selected automatically from a reserved list</i>	<input type="radio"/> Manual Entry <input checked="" type="radio"/> Auto-generated <input type="radio"/> From reserved list
Order Number Re-finalised Incrementation <i>Append re-finalised order with a incremental counter on the order number</i>	<input type="checkbox"/> Off
Issue Order Types <i>Negotiation Orders - The supplier will be able to respond to the order. The supplier can negotiate quantities and prices, accept or decline items, etc.</i> <i>Pre-confirmed Orders - The order will automatically be set to the status 'Confirmed'</i>	<input checked="" type="radio"/> All <input type="radio"/> Negotiation Orders <input type="radio"/> Pre-confirmed Orders
Multi Order Drafts - Create and issue multiple orders for one or more suppliers over a set date range	<input checked="" type="checkbox"/> On
Multi Order Duplicate Check Override - Allow more than one price per purchase date, per product identifier	<input type="checkbox"/> Off
Multi Order Delivered To Override - Overrides Supplier/Customer Delivered To functionality within multi order excel import.	<input type="checkbox"/> Off
Supplier/Product Links Required - A supplier and product must be linked before an order can be issued	<input type="checkbox"/> Off
Supplier Reference Required - Adds an option to order templates to set whether a supplier reference is required before an order can be finalised	<input type="checkbox"/> Off
Customer Reference Required - Adds an option to order templates to set whether a customer reference is required before an order can be finalised	<input type="checkbox"/> Off
View & Finalise Multiple Orders - Allows the view & finalisation of multiple orders at once	<input type="checkbox"/> Off
Custom Fields - Set custom fields in the admin section which can be used within orders	<input type="checkbox"/> Off
General Notes in Confirmation Email - Confirmation Email to include General Notes	<input checked="" type="checkbox"/> On
Modify General Notes - Allows the general notes to be modified when an order is in an open state	<input type="checkbox"/> Off
Modify Product Comments - Allows the product comments to be modified when an order is in an open state	<input type="checkbox"/> Off
Transfer Intake Data - Allows intake data to be transferred between products within an order	<input type="checkbox"/> Off
Bulk Update Details - Allows the details of sent orders to be updated in bulk	<input type="checkbox"/> Off
Show Full Intake Data - When viewing an order, the full detail of the intake will be displayed by default, rather than only the condensed summary	<input type="checkbox"/> Off

[Save Settings](#)

Step 3

Order Numbers: Select General on the left-hand side which will allow you to select whether you want the order numbers to be manual entry, auto-generated or from reserved list.

Order Number Re-finalised Incrementation: You can enable and disable the re-finalisation of an order.

Issue Order Types: You can enable and disable various order types (negotiation order/confirmed order) during order generation.

Multi Order Drafts: You can then select to turn multi order drafts on or off.

Multi Order Duplicate Check Override: You can allow more than one price per purchase date, per product identifier

Multi Order Delivered to Override: You can override supplier/customer's 'Delivery To' functionality within multi order excel import.

Supplier/Product Links Required: You can then select to turn supplier product links on or off.

Supplier Reference Required: You can then select to turn supplier reference on or off.

Customer Reference Required: You can select to turn customer reference on or off.

View & Finalised Multiple Orders: You can view & finalise multiple orders at once.

Custom Fields: You can specify custom fields to be included within orders.

General Notes in Confirmation Email: You can enable or disable the inclusion of general notes in confirmation email.

Modify General Notes: You can modify the general notes when an order is in an open state.

Modify Product Comments: You can modify product comments when an order is in an open state.

Transfer Intake Data – You can transfer intake data between products within an order.

Bulk Update Details – You can update the details of sent orders in bulk.

Show Full Intake Data – You can default the full detail of the intake data when viewing an order, rather than only the condensed summary

Press save setting on the bottom right once completed.

Setting	Option
Order Numbers <i>Manual entry - A order number must be manually entered when issuing an order</i> <i>Auto-generated - An order number will be automatically generated by Foods Connected</i> <i>From reserved list - An order number will be selected automatically from a reserved list</i>	<input type="radio"/> Manual Entry <input checked="" type="radio"/> Auto-generated <input type="radio"/> From reserved list
Order Number Re-finalised Incrementation <i>Append re-finalised order with a incremental counter on the order number</i>	<input type="checkbox"/> Off
Issue Order Types <i>Negotiation Orders - The supplier will be able to respond to the order. The supplier can negotiate quantities and prices, accept or decline items, etc.</i> <i>Pre-confirmed Orders - The order will automatically be set to the status 'Confirmed'</i>	<input checked="" type="radio"/> All <input type="radio"/> Negotiation Orders <input type="radio"/> Pre-confirmed Orders
Multi Order Drafts - Create and issue multiple orders for one or more suppliers over a set date range	<input checked="" type="checkbox"/> On
Multi Order Duplicate Check Override - Allow more than one price per purchase date, per product identifier	<input type="checkbox"/> Off
Multi Order Delivered To Override - Overrides Supplier/Customer Delivered To functionality within multi order excel import.	<input type="checkbox"/> Off
Supplier/Product Links Required - A supplier and product must be linked before an order can be issued	<input type="checkbox"/> Off
Supplier Reference Required - Adds an option to order templates to set whether a supplier reference is required before an order can be finalised	<input type="checkbox"/> Off
Customer Reference Required - Adds an option to order templates to set whether a customer reference is required before an order can be finalised	<input type="checkbox"/> Off
View & Finalise Multiple Orders - Allows the view & finalisation of multiple orders at once	<input type="checkbox"/> Off
Custom Fields - Set custom fields in the admin section which can be used within orders	<input type="checkbox"/> Off
General Notes in Confirmation Email - Confirmation Email to include General Notes	<input checked="" type="checkbox"/> On
Modify General Notes - Allows the general notes to be modified when an order is in an open state	<input type="checkbox"/> Off
Modify Product Comments - Allows the product comments to be modified when an order is in an open state	<input type="checkbox"/> Off
Transfer Intake Data - Allows intake data to be transferred between products within an order	<input type="checkbox"/> Off
Bulk Update Details - Allows the details of sent orders to be updated in bulk	<input type="checkbox"/> Off
Show Full Intake Data - When viewing an order, the full detail of the intake will be displayed by default, rather than only the condensed summary	<input type="checkbox"/> Off

Step 4: Select confirmation notes on the side tile. This will then allow you to manage the naming conventions for order confirmation numbers by order types. Changing these will change the displayed names for all existing orders as well as any future orders. Press save on the bottom right if any changes are made.

General

Manage the naming conventions for order confirmation numbers by order type.
Changing these will change the displayed names for all existing orders as well as any future orders.

Confirmation Names

Auto Finalise

Order Type	Confirmation Number	Name
Purchasing Order	Confirmation Number 1	<input type="text" value="Confirmation Number 1"/>
	Confirmation Number 2	<input type="text" value="Confirmation Number 2"/>
	Confirmation Number 3	<input type="text" value="Confirmation Number 3"/>
Sales Order	Confirmation Number 1	<input type="text" value="Confirmation Number 1"/>
	Confirmation Number 2	<input type="text" value="Confirmation Number 2"/>
	Confirmation Number 3	<input type="text" value="Confirmation Number 3"/>
Stock Transfer	Confirmation Number 1	<input type="text" value="Confirmation Number 1"/>
	Confirmation Number 2	<input type="text" value="Confirmation Number 2"/>
	Confirmation Number 3	<input type="text" value="Confirmation Number 3"/>

Save Settings

Step 5: Select the auto finalise button on the left-hand tile. This sets up rules to automatically finalise orders once confirmed. To add in a new rule please select Add Rule as per the below. Once you click this it will take you to the pop-up screen shown below. Add in relevant information to create the new rule and press save.

Order Manager

Templates → Sent Orders ← Received Orders Activity Admin

General

Set up rules to automatically finalise orders

Confirmation Names

Auto Finalise

Add Rule

Supplier

There are no auto finalise rules.

FOODS CONNECTED

Add Auto Finalise Rule

Supplier:

Order Type:

Order Sub-Type:

Order Creator:

Contains Livestock Products?:

Primary Quantity Tolerance %: %

Allow supplier added line items:

Cancel Save

Step 6: Select the "Order Lists Optional Columns" button on the left-hand tile. This allows you to choose which additional columns (such as General Notes and Product Group 1) will be available for selection in both the Sent and Received screens (on the supplier side).

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General Setup which additional columns you would like made available for selection in both the Sent AND Received (on suppliers side) lists below.

Confirmation Names

Auto Finalise

Order Lists Optional Columns (highlighted in red box)

Order View Configuration

Column Name	
General Notes	Off
Product Specific Fields	
Product Group 1	Off

Save Settings

Step 7: Select the "Order Lists Optional Columns" button on the left-hand tile. This allows you to choose which additional columns (such as General Notes and Product Group 1) will be available for selection in both the Sent and Received screens (on the supplier side).

[IF CANCELLATION REASONS ARE INCLUDED IN YOUR COMPANY SUBSCRIPTION]

Step 8

How to activate cancellation reasons: To include reasons when orders are cancelled, select Cancellation Reasons. You can toggle cancellation reasons on or off by selecting Enable Order Cancellation.

General Manage cancellation settings for order cancellation.

Confirmation Names Prompts users to select a predefined reason on order cancellation and adds the Cancellation status to orders.

Auto Finalise

Custom Views

Cancellation Reasons (highlighted in red box)

Order View Configuration

Custom Fields

Enable Order Cancellation Yes (highlighted in red box)

+ Add Cancellation Reason

Cancellation Reason	Active		
Incorrect Data	<input checked="" type="checkbox"/>		
Price	<input checked="" type="checkbox"/>		
Rain	<input checked="" type="checkbox"/>		
Transferred to New Booking	<input checked="" type="checkbox"/>		

Save Settings

How to create a new cancellation reason: To add new cancellation reason, please select Add Cancellation Reason as per the below. Add in relevant information to create the new cancellation reason and press save.

General Manage cancellation settings for order cancellation.
Confirmation Names Prompts users to select a predefined reason on order cancellation and adds the Cancellation status to orders.

Auto Finalise Enable Order Cancellation Yes

Custom Views

Cancellation Reasons [+ Add Cancellation Reason](#)

Cancellation Reason	Active		
Incorrect Data	<input checked="" type="checkbox"/>		
Price	<input checked="" type="checkbox"/>		
Rain	<input checked="" type="checkbox"/>		
Transferred to New Booking	<input checked="" type="checkbox"/>		

[Save Settings](#)

Add Cancellation Reason

Cancellation Reason

Reason Active

[Cancel](#) [Save](#)

How to delete a cancellation reason: To delete a cancellation reason, please select the red icon as per the below.

Order Manager

Templates → Sent Orders ← Received Orders Activity ▾ **Admin**

General Manage cancellation settings for order cancellation.
Confirmation Names Prompts users to select a predefined reason on order cancellation and adds the Cancellation status to orders.

Auto Finalise Enable Order Cancellation Yes

Custom Views

Cancellation Reasons [+ Add Cancellation Reason](#)

Cancellation Reason	Active		
Incorrect Data	<input checked="" type="checkbox"/>		
Price	<input checked="" type="checkbox"/>		
Rain	<input checked="" type="checkbox"/>		
Transferred to New Booking	<input checked="" type="checkbox"/>		

[Save Settings](#)

Step 9 – Order View Configuration: In the Admin section, you can also configure the view of orders within Order Manager Tool. You can analyse your intake data, configure Intake Data to be shown in the summary table, display/undisplay body number, display/undisplay Animal ID and hide line items with zero quantity.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General Order View Configuration & Visible Columns Within Order Manager Tool.

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Intake Data - Source

Intake Field Data Source

Intake Data Analysis

Intake Data Analysis

Intake Data - Summary Table

Show Product Intake Summary Tables

P8 Fat	<input type="button" value="No"/>
Dead On Arrival	<input type="button" value="No"/>
Dead In Yard	<input type="button" value="No"/>
Euthanised	<input type="button" value="No"/>
ACFM P8	<input type="button" value="No"/>
Carc Trim	<input type="button" value="No"/>
Total Weight	<input type="button" value="No"/>
Total Cost	<input type="button" value="No"/>

Intake Data - Detail Table

Total Value Decimal Places 2 3 4

Step 10 – How to show or hide Product Intake Summary Table: In the Admin section, navigate to Order View Configuration and locate ‘Show Product Intake Summary Tables’.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ James ▾

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General Order View Configuration & Visible Columns Within Order Manager Tool.

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Intake Data - Source

Intake Field Data Source

Intake Data Analysis

Intake Data Analysis

Intake Data - Summary Table

Show Product Intake Summary Tables **Yes**

P8 Fat	<input type="text" value="No"/>
Dead On Arrival	<input type="text" value="No"/>
Dead In Yard	<input type="text" value="No"/>
Euthanised	<input type="text" value="No"/>
ACFM P8	<input type="text" value="No"/>
Carc Trim	<input type="text" value="No"/>
Total Weight	<input type="text" value="No"/>
Total Cost	<input type="text" value="No"/>

Intake Data - Detail Table

Total Value Decimal Places 2 3 4

[Add New View](#)

- When this option is set to Yes (as shown below), two types of summary tables will be displayed in the order view: the overall summary table and the summary table per product code.
- When this option is set to No (as shown below), ONLY the overall summary table will be displayed in the order view

Over the Hooks Purchase - Blue Sky Meats

Date:	22/02/2021 19:27
Order Number:	182
Order Title:	Over the Hooks Purchase - Blue Sky Meats
Sent By:	Steve Jones - Demo Site
Sent To:	JBS - Lauren Neill
Delivered To:	Abattoir 1 - User 1 Abattoir
Status:	Confirmed
Purchase Date:	23/02/2021 03:00
Confirmation Number 1	123
Dispatch Date:	22/02/2021 18:00



Products Lines

Product	Price	Requested Quantity	Actual Quantity	Comments	Requested Delivery Date - Time	Net Value	Tax	Gross Value
Car 603 - Lamb Carcass	AUS\$ 6.50/Kg	10.00 Head	232.20 Kg 10.00 Head	N/A	23/02/2021 03:00	AUS\$ 1,509.30	10.00%	AUS\$ 1,660.23
Total						AUS\$ 1,509.30		AUS\$ 1,660.23

Kill Date	No. of Animals	Average Weight	Total Weight	Genders	No. of Condemned	Average Price Adjustment	Price	Total Cost
01/08/2020	10	23.22	232.20	M (5 Animals) F (5 Animals)	0	0.00	6.50 / Kg 150.03 / Head	1,509.30
Totals:		Average Weight: 23.22 Kg	232.20 Kg	M (5 Animals) F (5 Animals)	0	0.00	Average Price: AUS\$ 6.50	AUS\$ 1,509.30

Contact Information

Demo Site 178 W Lake St, Chicago, IL, 60607, United States	JBS 100 Patrick Street, Gainsville, FL, 52405, United States	Abattoir 1 123 Demo Street, Demo City, Iowa, IO1234, United States
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Step 11 – How to show or hide P8 Fat, Dead on Arrival, Dead in Yard, Euthanised, ACFM P8, Carc Trim, Total Weight & Total Cost: In the Admin section, navigate to Order View Configuration and go to ‘Intake Data – Summary Table’.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

Successfully updated Order Manager settings.

General Order View Configuration & Visible Columns Within Order Manager Tool.

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Intake Data - Source

Intake Field Data Source

Intake Data Analysis

Intake Data Analysis

Intake Data - Summary Table

Show Product Intake Summary Tables

P8 Fat	<input checked="" type="checkbox"/>
Dead On Arrival	<input checked="" type="checkbox"/>
Dead In Yard	<input checked="" type="checkbox"/>
Euthanised	<input checked="" type="checkbox"/>
ACFM P8	<input checked="" type="checkbox"/>
Carc Trim	<input checked="" type="checkbox"/>
Total Weight	<input checked="" type="checkbox"/>
Total Cost	<input checked="" type="checkbox"/>

You can show or hide P8 Fat, Dead on Arrival, Dead in Yard, Euthanised, ACFM P8, Carc Trim, Total Weight & Total Cost in the summary table as per the below.

Lamb Carcass Purchase Order

Date:	31/08/2020 01:36
Order Number:	6
Order Title:	Lamb Carcass Purchase Order
Sent By:	Steve Jones - Demo Site
Sent To:	Abattoir 1 - User 1 Abattoir
Delivered To:	Abattoir 1 - User 1 Abattoir
Status:	Finalised
Purchase Date:	31/08/2020 03:00
Dispatch Date:	30/08/2020 18:00



Products Lines

Product	Price	Requested Quantity	Confirmed Quantity	Actual Quantity	Comments	Requested Delivery Date - Time	Net Value	Tax	Gross Value
Car 603 - Lamb Carcass	AUS\$ 7.20/Kg	10.00 Head	10.00 Head	225.00 Kg 10.00 Head	N/A	31/08/2020 03:00	AUS\$ 1,620.00	0.00%	AUS\$ 1,620.00
Total							AUS\$ 1,620.00		AUS\$ 1,620.00

Intake Data - Car 603 - Lamb Carcass

Kill Date	No. of Animals	Average Weight	Total Weight	Genders	Average Fat	ACFM P8	Carc Trim	No. of Condemned	Dead On Arrival	Dead In Yard	Euthanised	Average Price Adjustment	Price	Total Cost
01/08/2020	10	22.50	225.00	M (4 Animals) F (6 Animals)	0.00 mm			0	0 Animal(s)	0 Animal(s)	0 Animal(s)	0.00	7.20 / Kg 162.00 / Head	1,620.00
Totals:	10	Average Weight: 22.50 Kg	225.00 Kg	M (4 Animals) F (6 Animals)	Average Fat: 0.00 mm			0	0 Animal(s)	0 Animal(s)	0 Animal(s)	0.00	Average Price: AUS\$ 7.20	AUS\$ 1,620.00

Step 11 – How to create a custom view of the Intake Data Detail Table: In the Admin section, navigate to Order View Configuration and go to 'Intake Data – Detail Table.' In this section, you can customise which intake data fields to be shown in specific templates or all templates.

- Click on 'Add New View' to create the custom view.
- Enter the name of the custom view under 'Name'.
- Select 'All Order Templates' under 'Applicable To' if the custom view is for all templates, or choose 'Selected Order Templates' for specific templates.
- Choose fields to be displayed in the intake data summary table under 'Included Intake Fields'.
- Specify the field for sorting the summary table under 'Default Sorting'.
- Finally, click on 'Save'.

General Order View Configuration & Visible Columns Within Order Manager Tool.

Confirmation Names

Auto Finalise

Custom Views

Cancellation Reasons

Order View Configuration

Intake Data Analysis

Intake Data Analysis Off

Intake Data - Summary Table

Show Product Intake Summary Tables Yes

P8 Fat	<input type="checkbox"/> No
Dead On Arrival	<input type="checkbox"/> No
Dead In Yard	<input type="checkbox"/> No
ACFM P8	<input type="checkbox"/> No
Carc Trim	<input type="checkbox"/> No

Intake Data - Detail Table

Total Value Decimal Places 2 3 4

Name	Applicable To	Added By User
There are currently no views added...		

[Add New View](#)

Intake View Detail

Add intake data view configurations for order templates.

Name

Applicable To All Order Templates Selected Order Templates

Included Intake Fields

<input type="checkbox"/> Kill Date	<input type="checkbox"/> Dentition	<input type="checkbox"/> Weight Left	<input type="checkbox"/> Chain
<input type="checkbox"/> Kill Time	<input type="checkbox"/> Eye Muscle Area	<input type="checkbox"/> Weight Right	<input type="checkbox"/> Tag Number
<input type="checkbox"/> Animal ID	<input type="checkbox"/> RFT	<input type="checkbox"/> Butt Shape	<input type="checkbox"/> Sire Tag Number
<input type="checkbox"/> Gender	<input type="checkbox"/> pH	<input type="checkbox"/> Bruising	<input type="checkbox"/> Born Date
<input type="checkbox"/> Hot Weight (kg)	<input type="checkbox"/> Hump Height	<input type="checkbox"/> Loin Temp	<input type="checkbox"/> Age (Month & Days)
<input type="checkbox"/> MSA Index	<input type="checkbox"/> Ossification	<input type="checkbox"/> MSA PBR	<input type="checkbox"/> Total Tesco Bonus Paid (Pence per KG)
<input type="checkbox"/> Grade	<input type="checkbox"/> Saleable Meat Yield	<input type="checkbox"/> Hide Puller Damage	<input type="checkbox"/> Total Animal

Default Sorting

Step 12 – How to rename & reorder the intake fields in a custom view of the Intake Data Detail Table:
In the Admin section, navigate to Order View Configuration and go to 'Intake Data – Detail Table.'

- Select 'Configure'.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General

Order View Configuration & Visible Columns Within Order Manager Tool.

Confirmation Names

Intake Data - Source

Intake Field Data Source

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Intake Data Analysis

Intake Data Analysis

 Off

Intake Data - Summary Table

Show Product Intake Summary Tables

 Yes

P8 Fat

 Yes

Dead On Arrival

 Yes

Dead In Yard

 Yes

Euthanised

 Yes

ACFM P8

 Yes

Carc Trim

 Yes

Total Weight

 Yes

Total Cost

 Yes

Intake Data - Detail Table

Total Value Decimal Places

 2
 3
 4

Add New View

Name	Applicable To	Added By User	
Livestock Demo JH	Prime Beef Livestock Order (DR)		<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Configure

- To rename the intake data fields, locate the field name and enter the desired name in the empty box next to it.
- To reorder the fields, click and drag the field to a new position.
- Then, click 'Done' to save.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General

To re-order fields click and drag the corresponding field icon (↕) to the new required position. When you are finished click the 'Done' button to save your changes.

Cancel

Done

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Field Name		
Body No	<input type="text"/>	↕
Gender	<input type="text"/>	↕
Kill Date	<input type="text"/>	↕
Grade	<input type="text"/>	↕
P8 Fat (mm)	<input type="text"/>	↕
Hot Weight (kg)	<input type="text" value="Cold Weight"/>	↕
Animal ID	<input type="text"/>	↕
Base Price	<input type="text" value="Base Price"/>	↕
Price Adjustment	<input type="text"/>	↕
Final Price	<input type="text"/>	↕
Total Value	<input type="text"/>	↕

Step 13: To include custom fields within orders, select General on the side tile, turn on Custom Fields and select Save settings. Custom Fields will then appear at the bottom on the side tile.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General

- Confirmation Names
- Auto Finalise
- Order Lists Optional Columns
- Order View Configuration

Setting	Option
Order Numbers <i>Manual entry - A order number must be manually entered when issuing an order</i> <i>Auto-generated - An order number will be automatically generated by Foods Connected</i> <i>From reserved list - An order number will be selected automatically from a reserved list</i>	<input type="radio"/> Manual Entry <input checked="" type="radio"/> Auto-generated <input type="radio"/> From reserved list
Order Number Re-finalised Incrementation <i>Append re-finalised order with an incremental counter on the order number</i>	<input type="checkbox"/> Off
Issue Order Types <i>Negotiation Orders - The supplier will be able to respond to the order. The supplier can negotiate quantities and prices, accept or decline items, etc.</i> <i>Pre-confirmed Orders - The order will automatically be set to the status 'Confirmed'</i>	<input checked="" type="radio"/> All <input type="radio"/> Negotiation Orders <input type="radio"/> Pre-confirmed Orders
Multi Order Drafts - Create and issue multiple orders for one or more suppliers over a set date range	<input checked="" type="checkbox"/> On
Multi Order Duplicate Check Override - Allow more than one price per purchase date, per product identifier	<input type="checkbox"/> Off
Multi Order Delivered To Override - Overrides Supplier/Customer Delivered To functionality within multi order excel import.	<input type="checkbox"/> Off
Supplier/Product Links Required - A supplier and product must be linked before an order can be issued	<input type="checkbox"/> Off
Supplier Reference Required - Adds an option to order templates to set whether a supplier reference is required before an order can be finalised	<input type="checkbox"/> Off
Customer Reference Required - Adds an option to order templates to set whether a customer reference is required before an order can be finalised	<input type="checkbox"/> Off
View & Finalise Multiple Orders - Allows the view & finalisation of multiple orders at once	<input type="checkbox"/> Off
Custom Fields - Set custom fields in the admin section which can be used within orders	<input checked="" type="checkbox"/> On
General Notes in Confirmation Email - Confirmation Email to include General Notes	<input checked="" type="checkbox"/> On
Modify General Notes - Allows the general notes to be modified when an order is in an open state	<input type="checkbox"/> Off
Modify Product Comments - Allows the product comments to be modified when an order is in an open state	<input type="checkbox"/> Off
Transfer Intake Data - Allows intake data to be transferred between products within an order	<input type="checkbox"/> Off
Bulk Update Details - Allows the details of sent orders to be updated in bulk	<input type="checkbox"/> Off
Show Full Intake Data - When viewing an order, the full detail of the intake will be displayed by default, rather than only the condensed summary	<input type="checkbox"/> Off

Save Settings

Then, select Custom Fields on the side tile. To a new custom field, please select Add New Field as per the below. Add in relevant information to create the new field and press save.

General Set custom fields which can be used within orders

Confirmation Names All Custom Fields

Display Name	Field Type	Used in Order Templates	Active
There are currently no custom fields matching the filter...			

Save Settings

Custom Fields

Add Custom Field

Display Name

Field Type



Active

Once the new field is created, you can add options in the field, to give users a list of responses to select from. To do this, select Edit Field as per the below. Select Add New Options, include option names and press Add/Update Options.

General Set custom fields which can be used within orders

Confirmation Names [Add New Field](#) All Custom Fields

Auto Finalise

Display Name	Field Type	Used in Order Templates	Active	
Field 1	Dropdown	0 Order Template(s)	<input checked="" type="checkbox"/>	 

Custom Views

Order View Configuration

[Custom Fields](#) [Save Settings](#)

Custom Field Options

Current Options Add New Options

Enter the names of options you would like to add.

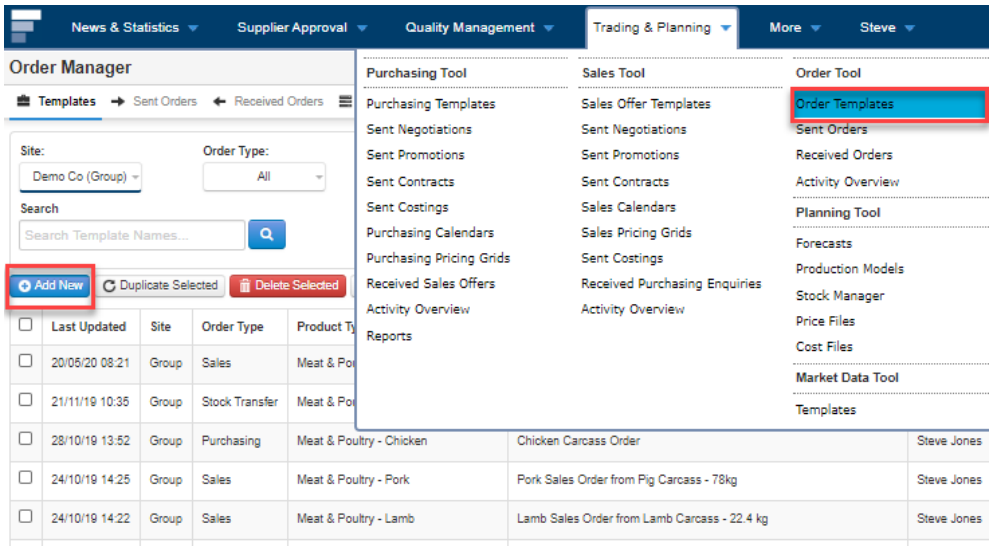
Option Name

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

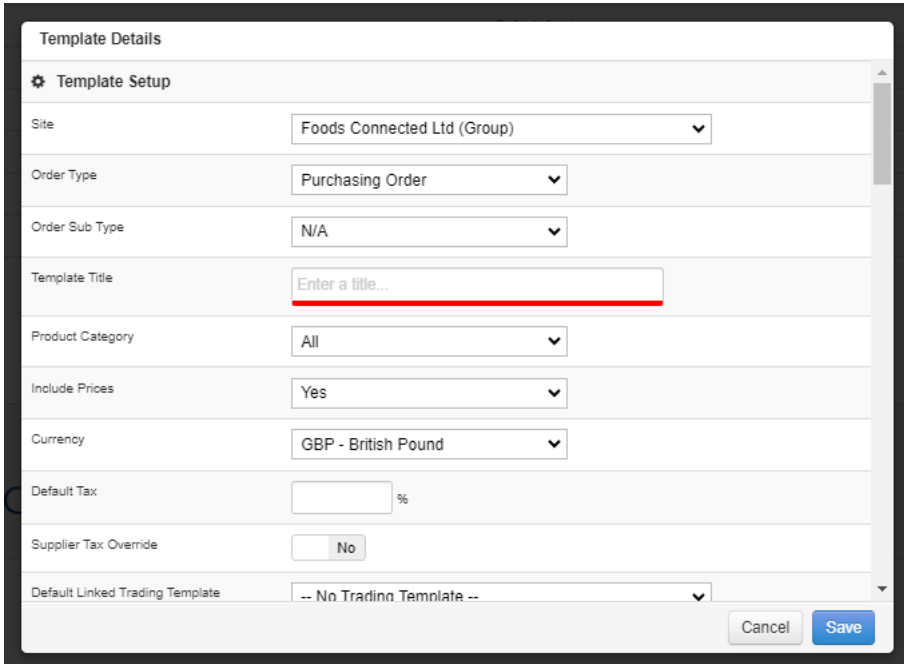
[Cancel](#) [Add/Update Options](#)

1.2 CREATING A TEMPLATE

Step 1: Select trading and planning then Order Templates and then select 'Add New'



Step 2: Add in the relevant inputs for the template and press save at the bottom right of the screen once completed



Site: Select the site that the template applies to

Order Type: Select the type of order: (Purchase, Sales, Stock Transfer)

Order Sub Type: Goods or Services

Template Title: Populate the name of the template e.g. Beef Buying Prices

Product Category: This will default to 'All', change if required to filter products which can be linked

Include Prices: Yes or No

Currency: Select the currency

Default Tax: Select the % of tax if any

Supplier Tax Override: Selecting the supplier tax override will automatically populate the tax on the order if it is set in the supplier details

Template Details

Default Linked Trading Template: -- No Trading Template --

Default Pricing Grid: -- No Pricing Grid --

Default Master Pricing Grid ⓘ: -- No Master Pricing Grid --

Allow Future Purchase Date? Yes No

Value based on Requested Quantity: Yes No

Show Secondary Unit Conversion: Yes No

Kill Dates Override Dispatch Date: Yes No

Enable Expected Kill Date: Yes No

Enable RCTI View: Yes No

Post Confirmation Products Category: None

⚙️ Custom Fields

Cancel Save

Default Linked Trading Template: Select a trading template that prices will be automatically linked to if required.

Default Pricing Grid: Select a pricing grid that will automatically cost the product based on the parameters set in the grid.

Default Master Pricing Grid (THIS IS ONLY SHOWN FOR PAID ADDITIONAL FEATURE): Select a master pricing grid that will automatically update the product to a new product code and cost it based on the parameters set in the grid. If this functionality is chosen, you can enable master grid downgrades, master grid pricing, or both. Additionally, you can select users who are authorized to override the master grid.

Allow Future Purchase Date: Yes or No. This feature will allow the user to create an order with a future date. When the toggle is set to 'No,' the user will not be able to issue an order beyond the current date.

Value based on Requested Quantity: Yes or No. When this feature is set to 'Yes', the gross and net values in the order are calculated based on the requested quantity.

Show Secondary Unit Conversion: Display the secondary unit conversion if it is configured in the company product file.

Kill Dates Override Dispatch Date: Yes or No. When this feature is set to 'Yes', Dispatch Date = Kill Date

Enable Expected Kill Date: Yes or No. When this feature is set to 'Yes', user can add the expected kill date during the generation of the order.

Enable RCTI View: Display the order in the RCTI view

Post Confirmation Products Category: Select the post-confirmation product category to be displayed on the Amend screen. This gives users the ability to add products after the order has been confirmed; however, the options of the products shown in the Amend screen are restricted to specific product types only.

Allow Future Purchase Date?	<input checked="" type="checkbox"/> Yes
Value based on Requested Quantity	<input type="checkbox"/> No
Show Secondary Unit Conversion	<input type="checkbox"/> No
Kill Dates Override Dispatch Date	<input type="checkbox"/> No
Enable Expected Kill Date	<input checked="" type="checkbox"/> Yes
Enable RCTI View	<input type="checkbox"/> No
Enable Space Bookings	<input checked="" type="checkbox"/> Yes
Post Confirmation Products Category	Cost

Enable Space Bookings: Yes or No. Please note that if Space Bookings is part of your company's subscription, space bookings will appear above Post Confirmation Products Category. Space booking allows users to issue an order without pricing.

Template Details	
⚙️ Custom Fields	
Enable Custom Fields	None

Enable Custom Fields: Select None, All or Selected If custom fields are configured in the admin section

The screenshot shows a 'Template Details' form with the following sections and fields:

- Supplier Options**
 - Supplier Type: All (dropdown)
 - Supplier Sub Type: All (dropdown)
 - Default Supplier: Avara 4 - A&C Turkeys 4 (dropdown)
 - Default Supplier Contact: Kevin Tyre (kevin@foodsconnected.com)
 - Show Intake Data to Supplier Users: Yes (checkbox)
 - Show Pricing to Supplier Users: Yes (checkbox)
- Response Options**
 - Tolerances Active: No (dropdown)
 - Response Comments Enabled: Yes (checkbox)
- Delivery Options** (header only, no fields visible)

At the bottom right of the form are 'Cancel' and 'Save' buttons.

Supplier Type: Select the type of supplier e.g. processor, cold store to filter options available

Supplier Sub Type: Select the sub type of supplier if required

Default Supplier: Will select a default 'sent to' supplier, can be left as 'Please Select' if you would like to select when issuing the order

Default Supplier Contact: Will select a default supplier contact, can be left as 'Please Select' if you would like to select when issuing the order

Show intake Data to Supplier Users: Yes or No: If selected yes the supplier will be able to see the intake data.

Show Pricing to Supplier Users: Yes or No: If selected yes the supplier will be able to see pricing.

Tolerances active: Yes or no, if selected yes it will allow configuration of acceptable tolerances levels for orders

Responses Comments Enabled: If selected Yes responders can add comments into a comment box

The screenshot shows a 'Template Details' form with two main sections: 'Delivery Options' and 'Confirmation Options'.

Delivery Options:

- Delivered to:** A dropdown menu set to 'Off'.
- Company Site:** A dropdown menu set to 'Foods Connected Ltd (Group)'.
- Delivered Supplier Type:** A dropdown menu set to 'All'.
- Delivered to Supplier:** A dropdown menu set to 'Avara 4 - A&C Turkeys 4'.
- Delivered to User:** A dropdown menu that is currently empty, with a blue message box below it stating 'No users available for the selected delivered supplier...'.
- Show Pricing to Delivered Users:** A toggle switch set to 'No'.
- Delivery Instructions:** A text area with the placeholder text 'Enter delivery instructions...'.

Confirmation Options: A section with a checkmark icon and the text 'Intake/Dispatch Notes'.

At the bottom right of the form are 'Cancel' and 'Save' buttons.

Delivered To: Allows you to configure who the product is delivered to and who is notified:

Off – No delivered to user

Company Site – A site within your business group

Supplier – Links to the Supplier Manager for Purchase orders and Customer Manager for Sales Orders

Delivery Instructions – Text field option

Company Site: Select the site

Delivered Supplier Type: Select the supplier sub type e.g. Producer or Processor

Delivered to Supplier: Select the supplier, can be left as 'Please Select' if you would like to select when issuing the order

Delivered to User: Select the user when issuing the order if users are available in the selected delivery supplier

Show Pricing to Delivered Users: If selected Yes the user is able to see the pricing

Delivery Instructions: When sending an order, the delivery instructions will be preset with this text. You may edit the instructions when sending an order.

The screenshot shows a 'Template Details' form with three main sections: Confirmation Options, Issuing Options, and Finalising Options. Each section contains several toggle switches and dropdown menus. The 'Completed By' dropdown is set to 'Receiver'. All toggle switches are currently set to 'No'. The 'Default Product Price File' dropdown is set to 'No Price File'. The 'Set Max Value Limit?' section has three radio buttons: 'None' (selected), 'Product Line Max Value', and 'Total Max Value'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Completed By: Select off or Receiver or Sender to specify who will be required to complete order confirmation details.

Require Confirmation Number 1 (Naming convention setup in admin section): Yes or No option

Require Confirmation Number 2 (Naming convention setup in admin section): Yes or No option

Require Confirmation Number 3 (Naming convention setup in admin section): Yes or No option

Require Dispatch Date: Yes or No option

Require Secondary Units: Yes or No option

Supplier Update Price on Confirmation: Yes or No option, this will allow the supplier to update prices.

Default Product Price File: Select a price file you would like to link to automatically populate prices. Please note you cannot select to link by trading template and price file.

Line-Item Price Check: If Yes it will prevent the immediate finalising of orders that have line items with a price of 0. Please note that this functionality will not impact line items with a price below or above 0.

Set Max Value Limit: Prevent immediate finalising of orders that have line items / total value over a set of value.

If 'Customer Reference Required' is turned on in the admin section,

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

General

- Confirmation Names
- Auto Finalise
- Order Lists Optional Columns
- Order View Configuration

Setting	Option
Order Numbers <i>Manual entry - A order number must be manually entered when issuing an order</i> <i>Auto-generated - An order number will be automatically generated by Foods Connected</i> <i>From reserved list - An order number will be selected automatically from a reserved list</i>	<input type="radio"/> Manual Entry <input checked="" type="radio"/> Auto-generated <input type="radio"/> From reserved list
Order Number Re-finalised Incrementation <i>Append re-finalised order with a incremental counter on the order number</i>	<input type="checkbox"/> Off
Issue Order Types <i>Negotiation Orders - The supplier will be able to respond to the order. The supplier can negotiate quantities and prices, accept or decline items, etc.</i> <i>Pre-confirmed Orders - The order will automatically be set to the status 'Confirmed'</i>	<input checked="" type="radio"/> All <input type="radio"/> Negotiation Orders <input type="radio"/> Pre-confirmed Orders
Multi Order Drafts - Create and issue multiple orders for one or more suppliers over a set date range	<input checked="" type="checkbox"/> On
Multi Order Duplicate Check Override - Allow more than one price per purchase date, per product identifier	<input type="checkbox"/> Off
Multi Order Delivered To Override - Overrides Supplier/Customer Delivered To functionality within multi order excel import.	<input type="checkbox"/> Off
Supplier/Product Links Required - A supplier and product must be linked before an order can be issued	<input type="checkbox"/> Off
Supplier Reference Required - Adds an option to order templates to set whether a supplier reference is required before an order can be finalised	<input type="checkbox"/> Off
Customer Reference Required - Adds an option to order templates to set whether a customer reference is required before an order can be finalised	<input checked="" type="checkbox"/> On
View & Finalise Multiple Orders - Allows the view & finalisation of multiple orders at once	<input type="checkbox"/> Off
Custom Fields - Set custom fields in the admin section which can be used within orders	<input type="checkbox"/> Off
General Notes in Confirmation Email - Confirmation Email to include General Notes	<input checked="" type="checkbox"/> On
Modify General Notes - Allows the general notes to be modified when an order is in an open state	<input type="checkbox"/> Off
Modify Product Comments - Allows the product comments to be modified when an order is in an open state	<input type="checkbox"/> Off
Transfer Intake Data - Allows intake data to be transferred between products within an order	<input type="checkbox"/> Off
Bulk Update Details - Allows the details of sent orders to be updated in bulk	<input type="checkbox"/> Off
Show Full Intake Data - When viewing an order, the full detail of the intake will be displayed by default, rather than only the condensed summary	<input type="checkbox"/> Off

[Save Settings](#)

this option will appear in the template setup.

Template Details

Require Confirmation Number 1 Yes

Require Confirmation Number 3 No

Require Dispatch Date Yes

Require Secondary Units No

Supplier Update Price on Confirmation No

Default Product Price File

Issuing Options

Line Item - Zero Price Check No

Finalising Options

Line Item - Zero Price Check No

Set Max Value Limit? None Product Line Max Value Total Max Value

Customer Reference Required No

[Cancel](#) [Save](#)

Step 3: Once you press save it will take you to the template to populate various fields as per the below. You can add general notes which will be displayed on the order and create requests for information which will require the responder to complete a text response to the request.

Template Information - Update Template Information

Site	Demo Co (Group)	Type	Purchasing
Default Supplier/Customer	-	Default Contact	-
Supplier/Customer Type	All	Product Category	All
Linked Template	-	Line Item - Zero Price Check	Inactive
Include Price	Yes	Currency	British Pound
Allowed Products	As Requested Only		

General Notes

Requested Information Add Requested Info

You have not added any requested information...

Products Lines Add Products

Currently no products have been added. Add Products to the Order Template by clicking 'Add Products'.

Product	Price	Quantity	Comment		
Currently no products have been added to the order...					

Save Template -

Step 4: To add products select Add Products as per the below. Once you select this you have can choose the product category and the product code. You can search by product code and description and tick the products you would like to add. If you press Manage Company Products this will take you to the product file in the settings page. Press add selected at the bottom right once completed.

Order Manager - Edit Order Template Back

Templates → Sent Orders ← Received Orders Activity Admin

Template Information - Update Template Information

Site	Demo Co (Group)	Type	Purchasing
Default Supplier/Customer	-	Default Contact	-
Supplier/Customer Type	All	Product Category	All
Linked Template	-	Line Item - Zero Price Check	Inactive
Include Price	Yes	Currency	British Pound
Allowed Products	As Requested Only		

General Notes

Requested Information Add Requested Info

You have not added any requested information...

Products Lines Add Products

Currently no products have been added. Add Products to the Order Template by clicking 'Add Products'.

Product	Price	Quantity	Comment		
Currently no products have been added to the order...					

Save Template -

Select Product(s)

Product Category: Cold Storage Services

Search your products...

	Product Code	Product Name
<input type="checkbox"/>	11112	Cold store pallet spaces

Buttons: Manage Company Products, Cancel, Add Selected Products

Step 5: Set up the unit of measure for both price and quantity.

Step 6: The order in which products are displayed can be amended by clicking 'Reorder Products' and dragging the products into the desired order and clicking save order. Additional line level comments can be added, and products deleted from the template.

Products Lines

Buttons: Save Order, Cancel Reorder, Add Products

Re-ordering instructions: To re-order the product lines, simply click on the rows in the table below and drag them into your desired order. When you are finished, click the 'Save Order' button to save your changes.

Product	Price	Quantity	Comment		
82764 - *YP* 100day GRAINFED MSA Tenderloin Side Strap Off for Butcher Shops IWWAC Crate	0.000000 Kg	0.00 Kg	Comment		
82765 - *YP* 100day GRAINFED MSA Striploin 0 Rib for Butcher Shops IWWAC Crate	0.000000 Kg	0.00 Kg	Comment		

Step 7: To link a product to its corresponding product line at the template level, click on "Linked Product." You can then add the linked product, its price, unit type, and tax information. Press "Save Linked Product" once you have completed the process.

Products Lines

Buttons: Reorder Products, Add Products

Product	Price	Quantity	Comment		
10002 - Rump	0.000000 Kg	0.00 Kg	Comment		

Save Template

Add Linked Product

Product: - Select -

Price: []

Unit Type: - Select -

Tax: [] %

Buttons: Cancel, Save Linked Product

Step 8: Click Save Template at the bottom of the screen. You will have two options either Save or Save & Exit (this will take you back to the order manager)

Template Information Update Template Information

Site	Demo Co (Group)	Type	Purchasing
Default Supplier/Customer	-	Default Contact	-
Supplier/Customer Type	All	Product Category	All
Linked Template	-	Line Item - Zero Price Check	Inactive
Include Price	Yes	Currency	British Pound
Allowed Products	As Requested Only		

General Notes

Requested Information Add Requested Info

You have not added any requested information...

Products Lines Add Products

Currently no products have been added. Add Products to the Order Template by clicking 'Add Products'.

Product	Price	Quantity	Comment
Currently no products have been added to the order...			

Save Template

Save

Save & Exit

1.3 DUPLICATING A TEMPLATE

Step 1: Select the template you would like to duplicate as per the below. Then select duplicate selected as shown below in the red box. Once you press the duplicate selected you will see the duplicated template like the below prefixed with 'Copy' at the end of the title.

Selected items have been successfully duplicated.

Site: All | Order Type: All | Product Category / Type: All | Linked Supplier/Customer: All | Created By: All | Last Edited By: All Filter Clear Filters

Search

Add New Duplicate Selected Delect Selected Multi Order Import

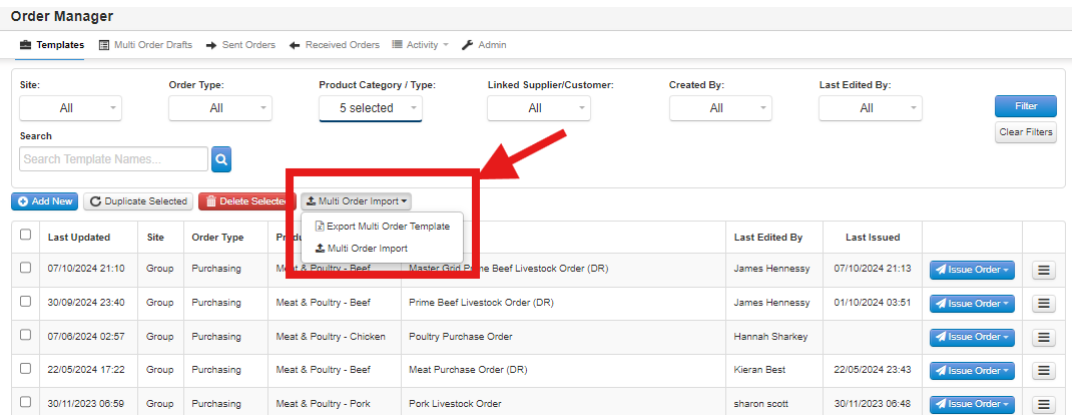
<input type="checkbox"/>	Last Updated	Site	Order Type	Product Type	Title	Last Edited By	Last Issued	Issue Order	Edit
<input type="checkbox"/>	08/07/20 05:04	Group	Purchasing	All	- Copy	Steve Jones		Issue Order	Edit
<input checked="" type="checkbox"/>	30/05/20 02:44	Group	Purchasing	All		Steve Jones		Issue Order	Edit
<input type="checkbox"/>	20/05/20 08:21	Group	Sales	Meat & Poultry	Supermarket 1 Sales	Steve Jones	20/05/2020	Issue Order	Edit
<input type="checkbox"/>	21/11/19 10:35	Group	Stock Transfer	Meat & Poultry - Chicken	Stock Transfer	Steve Jones	08/05/2020	Issue Order	Edit
<input type="checkbox"/>	28/10/19 13:52	Group	Purchasing	Meat & Poultry - Chicken	Chicken Carcass Order	Steve Jones		Issue Order	Edit
<input type="checkbox"/>	24/10/19 14:25	Group	Sales	Meat & Poultry - Pork	Pork Sales Order from Pig Carcass - 78kg	Steve Jones	21/05/2020	Issue Order	Edit
<input type="checkbox"/>	24/10/19 14:22	Group	Sales	Meat & Poultry - Lamb	Lamb Sales Order from Lamb Carcass - 22.4 kg	Steve Jones	17/12/2019	Issue Order	Edit
<input type="checkbox"/>	19/10/19 10:23	Group	Purchasing	Meat & Poultry - Beef	Beef Purchase Order from Beef Carcass Steer/Helfer RHL 325kg - Copy	Steve Jones	21/11/2019	Issue Order	Edit
<input type="checkbox"/>	11/10/19 09:43	Group	Purchasing	Cold Storage Services - Pallet Spaces	Weekly Cold Store Pallet Spaces Order	Steve Jones	24/09/2019	Issue Order	Edit

This will have copied all settings associated with the templates, which can then be updated by clicking 'edit' followed by 'Update Template Information'.



1.4 IMPORT / EXPORT

Step 1: Under templates select Multi Order Import as per the below screenshot. Please note that you can download the Multi Order Template by clicking 'Export Multi Order Template'.



Step 2: Once you select the multi order import the below screen will pop up.

Multi Order Import - Upload Excel File

Site: Demo Co (Group)

Multi Order Name: Enter multi order import name...

Order Type(s):
 Purchasing
 Sales
 Stock Transfer

Choose File: Choose file No file chosen

Cancel Next

Site: Select the site the import file will relate to

Multi Order Name: Input the name of the file

Order type(s): Select the type of order eg: purchasing, sales, stock transfer

Choose File: select the file that you would like to upload

Step 3: Press save on the bottom right of the pop-up box. The imported file will then display along with the other templates.

2. CREATING AN ORDER TEMPLATE

2.1 UPDATING AND ISSUING

Step 1: Select the three bars then click edit as per the below screenshot.

Order Manager

Templates Sent Orders Received Orders Activity Admin

Site: Demo Co (Group) Order Type: All Product Category / Type: All Linked Supplier/Customer: All Created By: All Last Edited By: All Filter Clear Filters

Search Search Template Names...

Add New Duplicate Selected Delete Selected Multi Order Import

<input type="checkbox"/>	Last Updated	Site	Order Type	Product Type	Title	Last Edited By	Last Issued	<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	06/07/20 05:04	Group	Purchasing	All	- Copy	Steve Jones		<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	30/06/20 02:44	Group	Purchasing	All		Steve Jones		<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	20/05/20 08:21	Group	Sales	Meat & Poultry	Supermarket 1 Sales	Steve Jones	20/05/2020	<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	21/11/19 10:35	Group	Stock Transfer	Meat & Poultry - Chicken	Stock Transfer	Steve Jones	08/05/2020	<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	28/10/19 13:52	Group	Purchasing	Meat & Poultry - Chicken	Chicken Carcass Order	Steve Jones		<input type="button" value="Issue Order"/>	<input type="button" value="Edit"/>

Step 2: Now click update template information as per the below.

Order Manager - Edit Order Template ← Back

Templates → Sent Orders ← Received Orders Activity Admin

Template Information - - Copy Update Template Information

Site	Demo Co (Group)	Type	Purchasing
Default Supplier/Customer	-	Default Contact	-
Supplier/Customer Type	All	Product Category	All
Linked Template	-	Line Item - Zero Price Check	Inactive
Include Price	Yes	Currency	British Pound
Allowed Products	As Requested Only		

General Notes

Requested Information Add Requested Info

You have not added any requested information...

Products Lines Add Products

Currently no products have been added. Add Products to the Order Template by clicking 'Add Products'.

Product	Price	Quantity	Comment		
Currently no products have been added to the order...					

Save Template

Step 3: Selecting the update template information will allow you to go in and edit details in the template. What each field represents was shown earlier in the guide 1.2 *Creating a Template*.

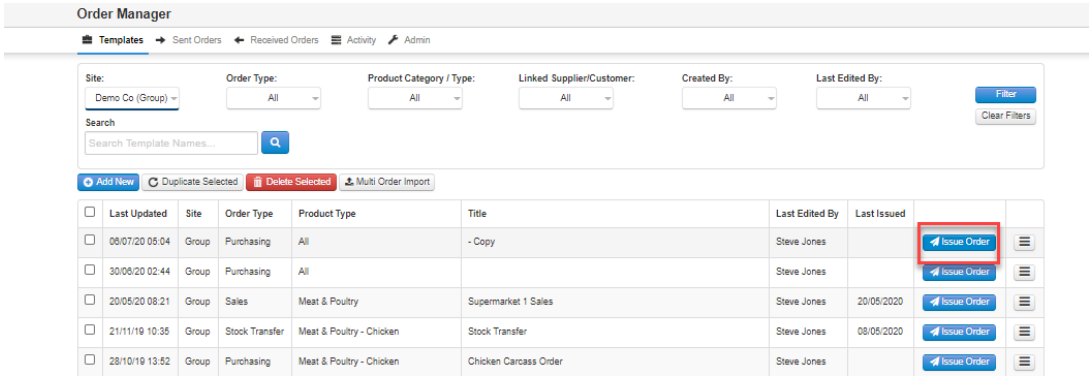
Template Details

Template Setup

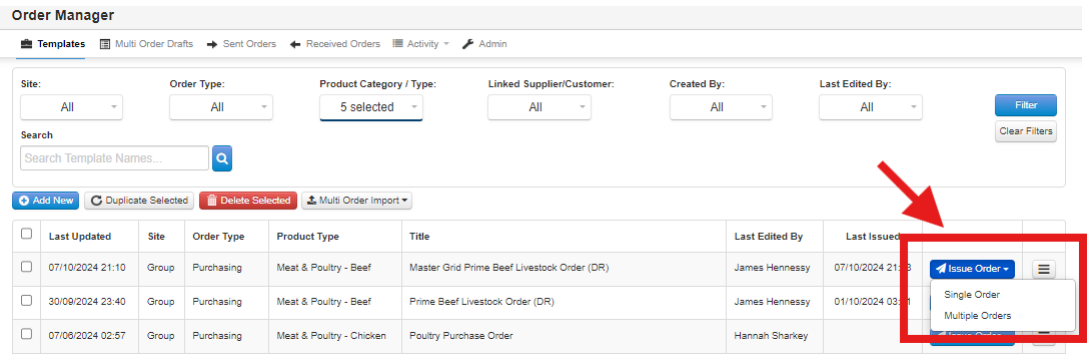
Site	Demo Co (Group)
Order Type	Purchasing Order
Order Sub Type	N/A
Template Title	- Copy
Product Category	All
Include Prices	Yes
Currency	GBP - British Pound
Default Tax	0 %
Default Linked Trading Template	-- Select Template --
Allow Future Purchase Date?	<input checked="" type="checkbox"/> Yes

Cancel Save

Step 4: To issue an order select issue order under the template heading as per the below.



If the Multi Orders functionality is turned on in the admin section, the order issuing options will appear as follows: clicking 'Issue Order' will provide you with two options: Single Order or Multi Order.



Step 5: Once selecting issue order the screen will take you to the template which is ready to populate the information.

a. Issuing an order with linked trading template & linked pricing grid

Order Manager - Issue Order

← Back

Step 1: Order Details

Order Name	<input type="text" value="test"/>	Order Number	<input type="text" value="152"/>
Supplier	<input type="text" value="Associated Seafood Ltd (GB MC002)"/>	Contact	<input type="text" value="Seachill Audit Team 2020"/>
Linked Trading Template	<input type="text" value="-- No Trading Template --"/>	Link Pricing Grid	<input type="text" value="-- No Pricing Grid --"/>
Purchase Date	<input type="text" value="22/01/2024"/> <input type="text" value="09:00"/>	Currency	<input type="text" value="USD"/>
General Notes	<input type="text"/>		
Customer PO	<input type="text"/>		

Step 2: Delivery Parameters

Delivery Date	<input checked="" type="radio"/> Single Delivery Date <input type="radio"/> Delivery Date Per Item	<input type="text" value="22/01/2024"/> <input type="text" value="09:00"/>
Expected Kill Date	<input type="text"/>	

Step 3: Products

Q Auto Find Prices

+ Add Products

Product	Price	Quantity	Comment	Issue
10002 - Rump	<input type="text" value="0"/> / Kg	<input type="text" value="0"/> Kg	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>

Issue Order

Order Name: Select the site that the template applies to

Order Number: This will either be pre-populated or you can enter an order number based on the setting configured in the admin section

Supplier: Select the supplier who the order is for

Contact: Select the contact that you would like to send the order to, from the supplier selected.

Linked Trading Template: If the order relates to a previously sent contract please link the respective trading template

Linked Pricing Grid: If an active pricing grid exists, please link it accordingly.

Purchase Date: The date of purchase

Delivery Date: The date of delivery, this can be set as one single delivery date or individual delivery dates per order item.

General Notes: Input additional notes relevant to the order

Auto Find prices: If the order is linked to a pre confirmed contract then selecting auto find prices will pull in the prices from the contract.

Add products: Add in additional products to the order if needed.



Issue: Allows you to tick which products you would like to send on the order

Price/Quantity: Update as required


b. Issuing an order with master pricing grid


Order Manager - Issue Order ← Back

Step 1: Order Details

Order Name	<input type="text" value="test"/>	Order Number	<input type="text" value="152"/>
Supplier	<input type="text" value="Associated Seafood Ltd (GB MC002)"/>	Contact	<input type="text" value="Seachill Audit Team 2020"/>
Link Master Grid	<input type="text" value="OBEGF-JANSF24-21JAN (01/01/2024 - 31/01/2024)"/> 		
Purchase Date	<input type="text" value="22/01/2024"/>  <input type="text" value="09:00"/>	Currency	<input type="text" value="AUD"/>
General Notes	<input type="text"/>		
Customer PO	<input type="text"/>		

Step 2: Delivery Parameters

Delivery Date Single Delivery Date Delivery Date Per Item 

Expected Kill Date 

Step 3: Products Q Auto Find Prices Add Products

Product	Price	Quantity	Comment	Issue	
10002 - Rump	<input type="text" value="0"/> / Kg	<input type="text" value="0"/> Kg	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Linked Master Grid: If an active master pricing grid exists, please link it accordingly. Master grid pricing will be automatically populated if this is set up at the template level.

c. Issuing an order with space bookings

Order Manager - Issue Order

← Back

Step 1: Order Details

Order Name: Order Number:

Supplier: Contact:

Link Master Grid: ⓘ This order will be issued as a Space Booking if the Linked Master Grid is left unselected.

Purchase Date: Currency:

General Notes:

Customer PO:



Step 2: Delivery Parameters

Delivery Date: Single Delivery Date Delivery Date Per Item

Expected Kill Date:

Step 3: Products

🔍 Auto Find Prices ➕ Add Products

Product	Price	Quantity	Comment	Issue
10002 - Rump	<input type="text" value="0"/> / Kg	<input type="text" value="0"/> Kg	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>

Issue Order

Linked Master Grid – Space booking: If there is no active master pricing grid, a space booking banner will be displayed.

Step 6: After adding in the product lines users can add in link products by selecting the plus sign on the template as per the below. Selecting the plus sign will then allow the user to select the linked product from the drop-down menu. Once selecting the product, the user can add in key fields such as price, unit of measure and tax. To set these linked products up the user will need to go into settings, product file and create a new one. The linked product will automatically populate based on the unit of measure. If for example it is linked to per head, once the confirmation note with actual kill data is uploaded the linked product will populate based on the confirmed quantity.

Product	Price	Tax	Quantity	Comment
32643 - Beef Carcase - Steer Supplementary Cattle	<input type="text" value="0.000000"/> <input type="text" value="Kg"/>	<input type="text" value="10.0000"/> %	<input type="text" value="0.00"/> <input type="text" value="Head"/>	<input type="text" value="Comment"/>
<ul style="list-style-type: none"> 26228 - Beef Hide - 0.00/Piece(s) ZBNL - Beef DPT Agriculture Levy - -5.00/Head ZBSL - IFS WA Beef State Levy - -0.20/Head 				



Add Linked Product ✕

Product: ZBNL - Beef DPT Agriculture Levy

Price: 1.00

Unit Type: Kg

Tax: 10%

Cancel Save Linked Product

Step 7: Once you have populated the data for the order, select issue order at the bottom of the screen. You will have two options. The first selecting a negotiation order, if this option is selected the order will be sent to the supplier for negotiation (e.g. for them to confirm or counter the requested amounts). The second option is to select a pre-confirmed order which will not open the template for negotiation with the supplier. Please note that in the admin section, you can enable and disable various order types (negotiation order/confirmed order) during order generation.

Step 2: Delivery Parameters

Delivery Date: Single Delivery Date Delivery Date Per Item | 07/07/2020 | 09:00

Delivered to: -- Please Select -- | Delivered To Contact: Please select a delivered supplier...

Step 3: Products Q Auto Find Prices + Add Products

Product	Price	Quantity	Comment	Issue	
227 - Pork Chops 6 Pack	0 / Packs	0 Packs	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
229 - Pork Leg Steaks	0 / Packs	0 Packs	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
229A - Pork Leg Steaks (*Promotion Pack)	0 / Packs	0 Packs	<input type="text" value="Comment"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Issue Order ▾

- Negotiation Order
- Pre-confirmed Order



Quick Links

- Products
- About Us
- Privacy Policy
- Help Section
- Contact Foods Connected
- Terms & Conditions

Supported By

Invest Northern Ireland

2.2 SINGLE OR MULTI ORDER

Step 1: Once you select the template you would like to send, choose Issue Order as per the instructions below. Then, select either the Single Order or the Multiple Order button. The Multi Order button can be configured in the admin section (as per section 1.1).

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity Admin

Site: All Order Type: All Product Category / Type: All Linked Supplier/Customer: All Created By: All Last Edited By: All Filter Clear Filters

Search Search Template Names...

Add New Duplicate Selected Delete Selected Multi Order Import

Last Updated	Site	Order Type	Product Type	Title	Last Edited By	Last Issued	
08/07/20 00:26	Group	Stock Transfer	Meat & Poultry - Beef	Beef OTH PO - Skins without value - levies Multiple Carcase - Copy	Admin Admin	07/07/2020	Issue Order Single Order Multiple Orders
07/07/20 23:26	Group	Purchasing	Meat & Poultry - Beef	Beef OTH PO - Skins without value - levies Multiple Carcase	Admin Admin	07/07/2020	

Step 2: If a single order is selected the template will only be sent to one supplier as per the below.

Order Manager - Issue Order Back

Step 1: Order Details

Order Name: Beef OTH PO - Skins without value - levies Multiple Order Number: 7063282732

Supplier: A O'Meehan Contact: All Users at A O'Meehan L

Currency: AUD

General Notes

Step 2: Delivery Parameters

Delivery Date: Single Delivery Date Delivery Date Per Item 09/07/2020 09:00

Delivered to: Australian Country Delivered To Contact: Production

Step 3: Products Q Auto Find Prices Add Products

There are errors with products contained in this order, highlighted red in the table below. Hover over the icon beside these products to view the error(s).

Product	Price	Quantity	Comment	Issue
32626 - Beef Carcase - Heifer MSA	250 / Kg	10 Kg	Comment	<input checked="" type="checkbox"/>
92854 - Hide Generic - 0.00/Kg				<input checked="" type="checkbox"/>

Step 3: When selecting a multi order,

- It will allow you to create multi-orders based on a date range or specific date selection. Go to the 'Date Method' field and select the appropriate option. See the screenshot below.
- If a master grid is set up in the template setup, this option will be available when creating multi-orders. Go to 'Link Master Grid' and select an active or approved master grid. Once a master grid is selected, it will apply to all orders at once.

Create Multi Order Draft Details

Products • CAR606 - Prime Beef Carcase

Date Method Date Range Date Selection

Date Range 08/10/2024 09:00 12/10/2024 09:00

Order Name Master Grid Prime Beef Livestock Order (DR)

Link Master Grid -- No Master Grid --

These orders will be issued as Space Bookings if the Linked Master Grid is left unselected.

Delivered To Supplier

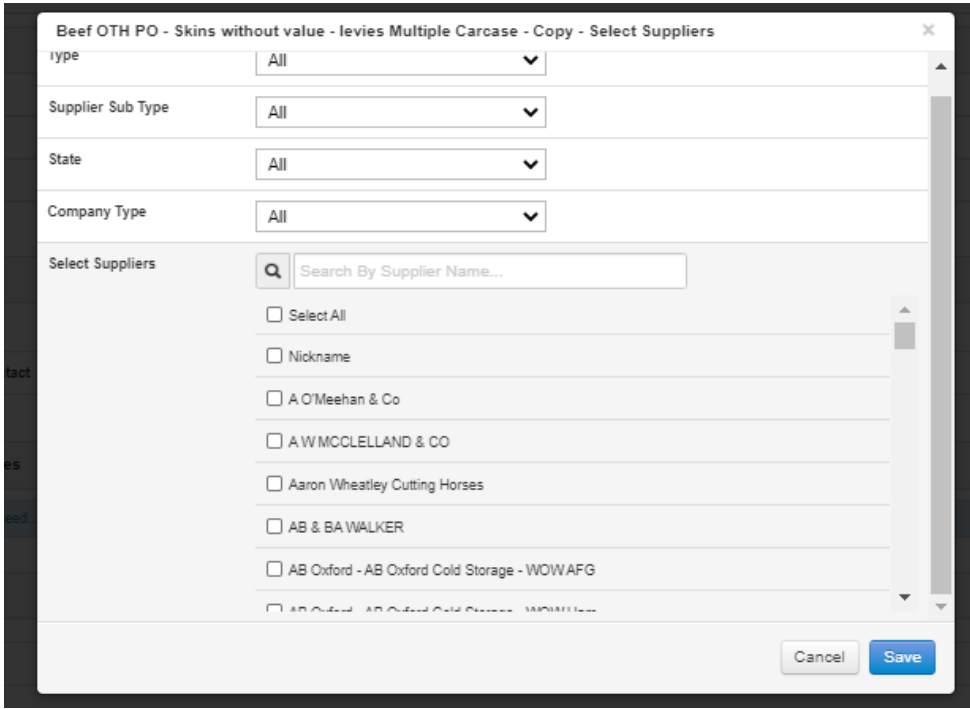
Delivered To Type Single Multi

Delivered Supplier Type All

Delivered to Supplier Abattoir 1

Cancel Next >

Step 3: When selecting a multi order it will allow you to send the above template to multiple suppliers. Select the information for the key fields below and select the suppliers that you want to send the order to. Note you can also search the suppliers by name.



Step 4: Click save once you have selected the suppliers you want to send the order to. It will then take you to the template where you fill in the required information. You will note as per the below template it is being sent to four suppliers instead of one as per the previous example. This can also allow multiple orders for different days to be issued in one step.

Order Manager - Multi Order Draft - Beef Sales Order 5th Quarter (DR) ← Back

Step 1 - Order Details ✔ Edit Details

Products

- BP-100 - Rumen Tripe
- BP-101 - Cheek Meat
- BP-102 - Liver
- BP-103 - Kidney
- BP-104 - Omasum Tripe
- BP-105 - Tongue

Date Range: 05/07/2023 - 09/07/2023

Order Name: Beef Sales Order 5th Quarter (DR)

Currency: GBP - British Pound

Step 2 - Suppliers ✔ Add Supplier

Supplier	Contact	Linked Trading Template	Link to	Pricing Grid	Delivered To Customer	
Abattoir 1	User 1 Abattoir	Not Linked	Not Linked	Not Linked	Not Linked	✔
Abattoir 2	User 1 Abattoir 2	Not Linked	Not Linked	Not Linked	Not Linked	✔
ABC Laboratories	Lab Manager	Not Linked	Not Linked	Not Linked	Not Linked	✔
Foods Connected	User 1 Abattoir 2	Not Linked	Not Linked	Not Linked	Not Linked	✔

Step 3 - Supplier Quantities ⌵ Export

Abattoir 1

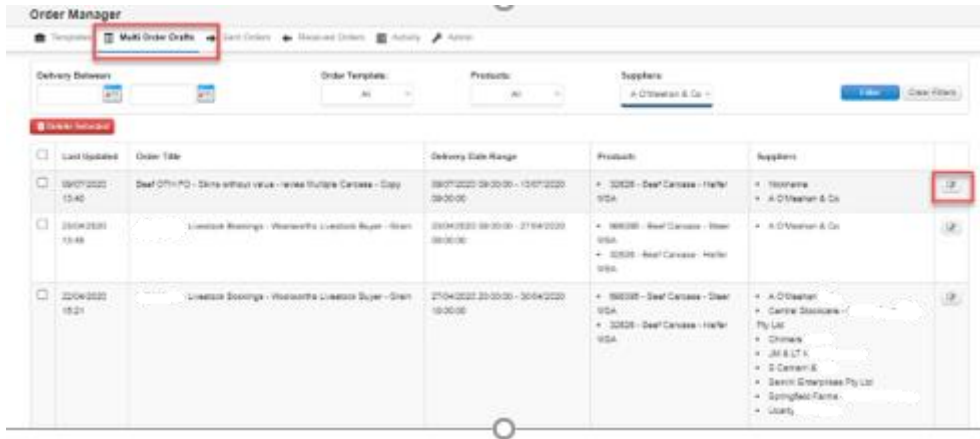
Product	Price	Wednesday 05/07/2023 09:00	Thursday 06/07/2023 09:00	Friday 07/07/2023 09:00	Saturday 08/07/2023 09:00	Sunday 09/07/2023 09:00	Issue Select All
BP-100 - Rumen Tripe	1.27 / Kg	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	✔
BP-101 - Cheek Meat	4.73 / Kg	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	QTY 0 Cartons	✔

Step 5: The multi order allows you to send multiple orders to multiple suppliers. Once you have issued the multi order the orders will split out in the system as individual orders.

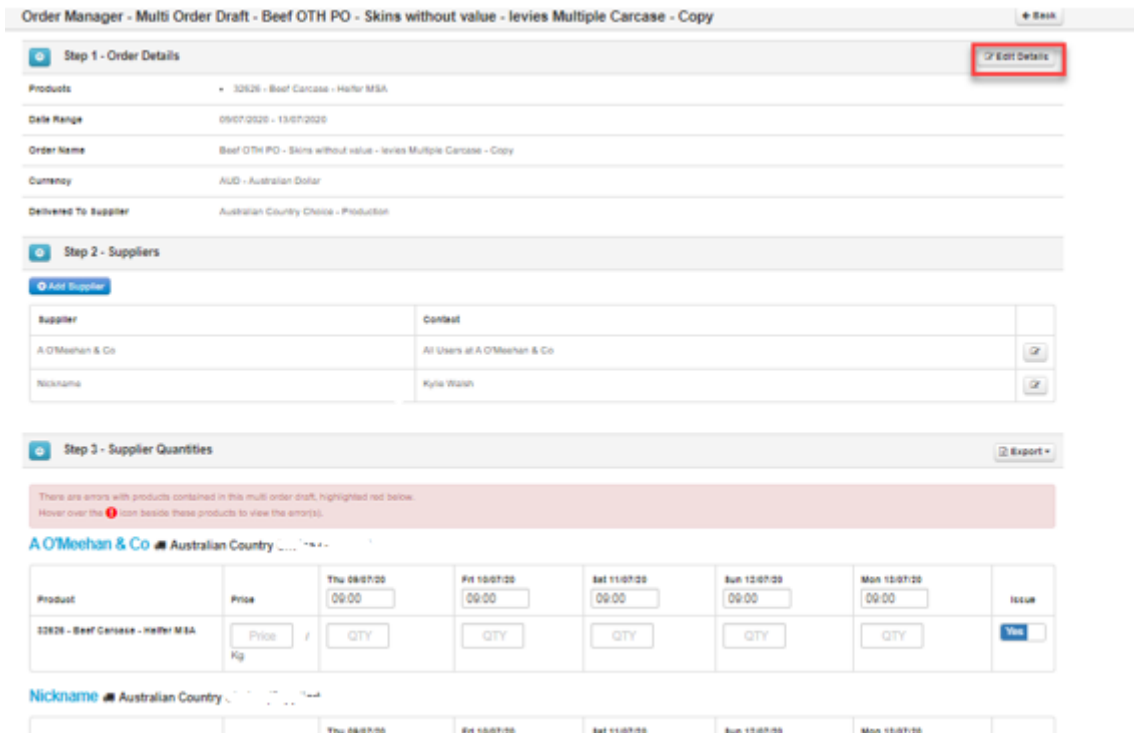
3. MULTI ORDER DRAFTS

3.1 UPDATING AND ISSUING

Step 1: Select the Multi Order Drafts tab under the Order manager tab, then select the template that you would like to update and send as per the below.

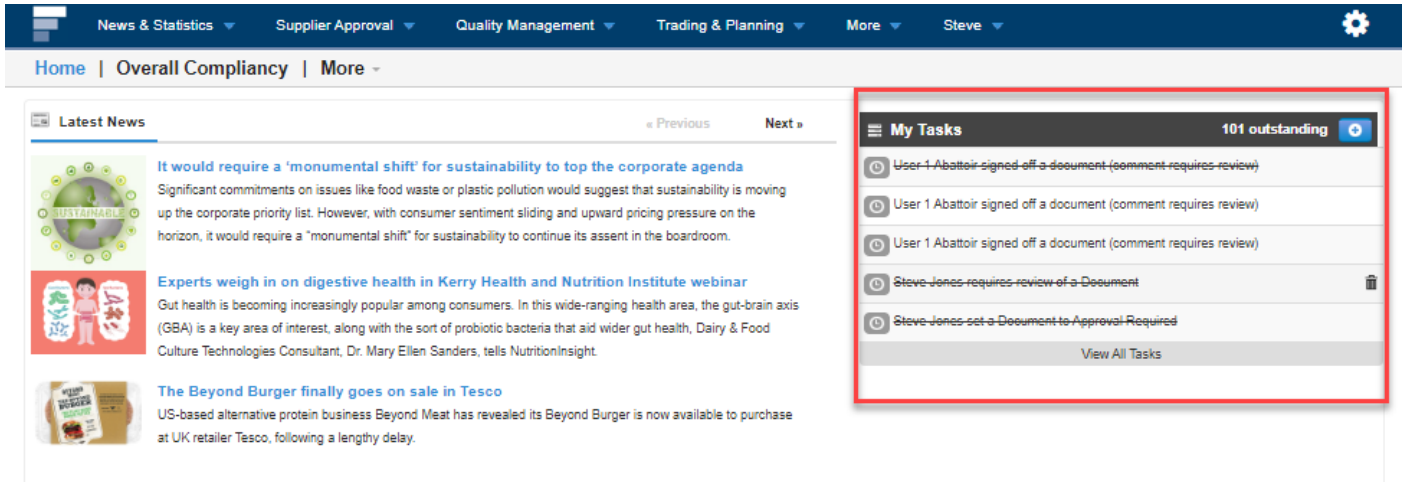


Step 2: Once you select the template to edit it will take you to the multi order as per the below. Now you can amend the template by updating the information in the template and edit the Order details by selecting 'Edit Details'. Press save draft once completed.



3.2 NOTIFICATIONS

Step 1: Once you send the template to the selected users, will receive notifications in one of two places. The first is when they log into Foods Connected home screen, they will see notifications in the ‘my tasks’ bar as per the below. They will also receive an email notification if their account has been setup with this access. If they click on the task, it will take them to the order that requires there action.



4. SENT ORDERS

4.1 UPDATING AND ISSUING

Step 1: Select Sent Orders either under trading and planning or on the top tab as per the below. Filter the template you would like to edit through the filters at the top of the screen. Once you have filtered the sent order you would like to edit select template and click the button on the right of screen as per the below.

Order Manager

Templates Multi Order Drafts **Sent Orders** Received Orders Activity Admin

Currently viewing ALL SITES sent orders Change Site Viewing 65 results | Page 1 of 3

Sent Between Delivery Between Production Between Order Type Product Category/Type Template Company Search Filter

Sent By Sent To Delivered To Status Products Clear Filters

Delete Selected Upload Confirmation Note Update Dates Export Selected

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action	
<input type="checkbox"/>	22/08/2023 14:51	-	151	Purchasing Meat & Poultry - Beef	AMP - Livestock Purchasing Vendor	Foods Connected Ltd animal welfare	22/08/2023 09:00	Confirmed	Confirmation Note	
<input type="checkbox"/>	22/08/2023 14:47	-	150	Purchasing Meat & Poultry - Beef	AMP - Livestock Purchasing Vendor	Foods Connected Ltd animal welfare	22/08/2023 09:00	Confirmed	Confirmation Note	
<input type="checkbox"/>	22/08/2023 14:36	-	149	Purchasing Meat & Poultry - Beef	AMP - Livestock Purchasing Vendor	Foods Connected Ltd animal welfare	22/08/2023 09:00	Confirmed	Confirmation Note	

Step 2: Once you select the template that you would like to update you have five options.

Delivery Date	Status	Next Action	
22/08/2023 09:00	Confirmed	Confirmation Note	
22/08/2023 09:00	Confirmed	Confirmation Note	
22/08/2023 09:00	Confirmed	Confirmation Note	

- View
- Respond
- Update Details
- Edit Customer Reference
- Amend
- Finalise

View: This will allow you to view the sent order and the details within it.

Respond: This will allow you to respond to the sent order only if it ' Requires Your Action '. For example if you needed to upload a confirmation note to the order and clicked respond it would take you to the step to do this.

Update Details: This will allow you to update the details of the previously sent template, such as delivery time, linked master grid, expected kill date, supplier details, etc.

The screenshot shows a web form titled "Update Details". It contains several input fields and dropdown menus. The fields are: "Delivery Date - Time" (07/10/2024, 09:00), "Linked Master Grid" (dropdown: -- No Master Grid --), "Dispatch Date - Time" (Date, --:--:--), "Sent Supplier Type" (dropdown: All), "Sent to Company" (text: Farm 1 (08/170/0174)), "Sent to User" (dropdown: John Farmer), "Delivered to" (dropdown: Supplier), "Delivered Supplier Type" (dropdown: All), and "Delivered to Supplier" (text: Abattoir 1 (US 323232)). At the bottom right, there are "Cancel" and "Update" buttons.

Edit Customer Reference: This will allow to update the details of customer reference.

Amend: This will allow you to update the actual quantities requested on the order

Finalise: This will finalise the order and if the system is integrated with an internal payment system it will trigger payment to the relevant parties.

4.2 UPLOADING A CONFIRMATION NOTE

Step 1: Filter the status to Confirmed Awaiting Confirmation Note as per the below.

Order Manager

← Templates → **Sent Orders** ← Received Orders Activity Admin

Currently viewing ALL SITES sent orders Change Site Viewing 10 results | Page 1 of 1

Sent Between: Delivery Between: Production Between: Order Type: Product Category/Type: Template: Company: Search: Filter

Sent By: Sent To: Delivered To: Status: Confirmed - Awaiting Products: All Clear Filters

Delete Selected Upload Confirmation Note

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent By	Delivered To	Status	Action
<input type="checkbox"/>	21/05/2020 12:38	01/06/2020	1049	Sales Meat & Poultry - Pork	78kg - Pork production plans for Abattoir 1 - Pork Example Model 21/5/2020	Abattoir 1 User 1		Confirmed	Awaiting Confirmation Note
<input type="checkbox"/>	21/11/2019 10:36	-	1043	Stock Transfer Meat & Poultry - Chicken	Stock Transfer	Meat Supplier Kevin Smyth Factory 1		Confirmed	Awaiting Confirmation Note
<input type="checkbox"/>	29/10/2019 07:38	30/10/2019	1042	Sales Meat & Poultry - Lamb	22.4 kg - Chicken Carcass - Primary Yields Meyn - Chicken Example 30th	Abattoir 1 User 1 Abattoir Cold Store - User 1 Cold stores		Confirmed	Awaiting Confirmation Note
<input type="checkbox"/>	10/10/2019 11:08	10/10/2019	1029	Sales Meat & Poultry - Beef	Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef production for Supermarket 1 - Make sheet for Abattoir 1 with product for Supermarket 1	Abattoir 1 User 1 Abattoir Distribution Centre 1 - Distribution User 1		Confirmed	Confirmation Note

Step 2: Select the template that you would like to add the confirmation note to and click the blue button 'Confirmation Note'. It will then take you to the below screen where you will upload the confirmation note.

Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef production for Supermarket 1 - Make sheet for Abattoir 1 with product for Supermarket 1 - Confirmation

Order Details

Order Number: 1029 Order Title: Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef order from Beef Carcass Steer/Heifer R4L 325kg - Beef production for Supermarket 1 - Make sheet for Abattoir 1 with product for Supermarket 1

Sent By: Steve Jones - Demo Co Sent To: Abattoir 1 - User 1 Abattoir

Delivered To: Distribution Centre 1

Confirmation Details

Confirmation Number 1:

Step 1 - Download:

Step 2 - Populate & Upload: No file chosen

Total Quantity: 0.00 Kg

Step 3: Input in the Confirmation Number for the order.

Step 4: When uploading the confirmation, you will have two options to either Download the Import Sheet and populate in excel and re-import. Or fill in the required columns directly in the pop out window.

4.3 CHANGING THE STATUS

Step 1: The status of order template is shown on the summary of the sent orders as per the below. The next action also outlines what action is required next which in turn will change the status. The only user that can change the status is the one that the status 'Requires Your Action' relates to.

The screenshot shows the 'Order Manager' interface with a list of sent orders. A red box highlights the 'Status' and 'Next Action' columns for four orders. The first three orders have a status of 'Confirmed' and a 'Next Action' of 'Awaiting Confirmation Note'. The fourth order has a status of 'Confirmed Confirmation Note Sent' and a 'Next Action' of 'Finalise'.

Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action
1049	Sales Meat & Poultry - Pork	78kg - Pork production plans for Abattoir 1 - Pork Example Model 21/5/2020	Abattoir 1 User 1 Abattoir Abattoir 1 - User 1 Abattoir	02/08/2020 09:00	Confirmed	Awaiting Confirmation Note
1043	Stock Transfer Meat & Poultry - Chicken	Stock Transfer	Meat Supplier Kevin Smyth Factory 1	21/11/2019 09:00	Confirmed	Awaiting Confirmation Note
1042	Sales Meat & Poultry - Lamb	22.4 kg - Chicken Carcass - Primary Yields Meyn - Chicken Example 30th	Abattoir 1 User 1 Abattoir Cold Store - User 1 Cold stores	31/10/2019 09:00	Confirmed	Awaiting Confirmation Note
1039	Sales Meat & Poultry - Lamb	22.4 kg - Lamb production plans for Abattoir 1 - Lamb Production Make sheet for Abattoir 1	Abattoir 1 User 1 Abattoir Abattoir 1 - User 1 Abattoir	25/10/2019 09:00	Confirmed Confirmation Note Sent	Finalise

Step 2: Responding to a 'Negotiated order' or an 'Order Amend' Click respond as per the below to respond to the order.

The screenshot shows the 'Order Manager' interface with a list of sent orders. A red box highlights the 'Status' and 'Next Action' columns for two orders. Both orders have a status of 'Requires Your Action' and a 'Next Action' of 'Respond'.

Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action
1046	Sales Meat & Poultry - Lamb	Lamb Sales Order from Lamb Carcass - 22.4 kg	Abattoir 1 User 1 Abattoir Abattoir 1 - User 1 Abattoir	17/12/2019 09:00	Requires Your Action	Respond
1023	Purchasing Vegetables - Root/Tuber Vegetables	Produce purchase - Cyprus potatoes	Veg Supplier Sean Pearse Demo Co (Group)	12/09/2019 09:00	Requires Your Action	Respond

Step 3: This will take the user into the order where they can perform several functions.

Product	Price	Requested Delivery Date - Time	Requested Quantity	Total Confirmed Quantity
100 - Lamb Leg - Large Vac Carton	£ 5.00/Kg	17/12/2019 09:00	0.00 Kg	100.00 Kg
102 - Lamb Rack Cap On/Off for Cutlets VAC Carton	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg
103 - Lamb Chump Boneless VAC Carton	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg
108 - Lamb aitch bone	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg
111 - Lamb Body Fat 20.0kg FRZ Non-Halal Carton	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg
112 - Lamb Leg - Small VAC Carton	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg

Add Product: Clicking add product will allow the user to add in new products to the order.

Action: Clicking this will allow the user to edit the price.

Delete Product: Pressing the red button will delete the product out of the template.

You can also amend the custom field if it is included in the previously sent template.

You can not currently edit this order whilst it's at a status of 'Confirmed'. If you would like to edit this use the button to your right.

Order Name	Agent - Grain	Order Number	932237
Sent From	Andrew Lowe - NH Foods Australia Pty Ltd	Sent To	PITMAN DEAKIN PTY LTD - MOREE - pitman_deakin@bigpond.com.au; pitman_deakin@bigpond.com

Customer PO: 45985

Custom Field: abc

Step 4: Once you have updated the order you can then perform four functions. Cancel the order, Save or Save and Exit, Preview and Send Response and confirm order. Clicking confirm order will then change the status of the template.

139 - Lamb Shank - FQ/HQ VAC Carton	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg	Action	▼ 1	🗑️
158 - Lamb Render	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg	Action	▼ 1	🗑️
161 - Lamb Neck	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg	Action	▼ 1	🗑️
162 - Lamb breast pieces	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg	Action	▼ 1	🗑️
169 - Lamb rack cap	£ 0.00/Kg	17/12/2019 09:00	0.00 Kg	0.00 Kg	Action	▼ 1	🗑️

Cancel
Save
Preview & Send Response
Confirm Order

Step 5: If the order is raised with space booking, you can filter it by selecting 'Confirmed – Space Booking' from the Status column.

Order Manager

Templates Multi Order Drafts **Sent Orders** Received Orders Activity Admin

Currently viewing ALL SITES sent orders Change Site Viewing 18 results | Page 1 of 1

Sent Between

Delivery Between

Expected Kill Between

Order Type: Purchasing

Sent By: All

Product Category/Type: All

Sent To: All

Template: All

Delivered To: All

Company: All

Status: Confirmed - Spa

Search: Search...

Products: All

Search

Select all

Requires Your Action

Awaiting Response

Confirmed

Confirmed - Space Booking

Confirmed - Awaiting Confirmation Note

<input type="checkbox"/>	Sent Date	Order No.	Order Type	Title	Sent To				Action	👁️
<input type="checkbox"/>	09/01/2024 08:45	932173	Purchasing Meat & Poultry - Beef	Vendor – Grain (Koen Test)	NH FOODS - PENDING LIVESTOCK SUPPLIER - Oakey Beef Exports Pty Ltd Livestock Admin Oakey Beef 🐾 Oakey Beef Exports Pty Ltd	09/01/2024 09:00	10/01/2024	Confirmed - Space Booking 🚫	Confirmation Note	☰
<input type="checkbox"/>	03/11/2023 16:58	932052	Purchasing Meat & Poultry - Beef	Saleyard	GRANT DANIEL & LONG PTY LTD - AGENT (dalby@gdlrural.com.au) 🐾 Oakey Beef Exports Pty Ltd	03/11/2023 09:00	06/11/2023	Confirmed - Space Booking 🚫	Confirmation Note	☰
<input type="checkbox"/>	03/11/2023 16:57	932051	Purchasing Meat & Poultry - Beef	Saleyard	Topx Australia Pty Ltd - ROMA (andrews@topx.com.au) 🐾 Oakey Beef Exports Pty Ltd	03/11/2023 09:00	06/11/2023	Confirmed - Space Booking 🚫	Confirmation Note	☰

Step 6: If the steps have been followed above and the user has uploaded a confirmation note and responded to the order they are then able to finalise the order, which in doing so will show finalised as per the below preventing any further changes.

Order Manager

Templates → Sent Orders ← Received Orders Activity Admin

Currently viewing ALL SITES sent orders Change Site Viewing 9 results | Page 1 of 1

Sent Between: Delivery Between: Production Between: Order Type: All Product Category/Type: All Template: All Company: All Search: Filter
 Sent By: All Sent To: All Delivered To: All Status: Finalised Products: All Clear Filters

Delete Selected Upload Confirmation Note Export Selected

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action	
<input type="checkbox"/>	08/05/2020 09:04	-	1047	Stock Transfer	Stock Transfer	Meat Supplier Kevin Smyth Factory 1	08/05/2020 09:00	Finalised Confirmation Note Sent		
<input type="checkbox"/>	21/11/2019 14:45	-	1044	Purchasing Meat & Poultry - Beef	Lamb production plans for Abattoir 1 - Lamb Production Make sheet for Abattoir 1 - Service Order	Abattoir 1 User 1 Abattoir	24/10/2019 08:00	Finalised Confirmation Note Sent		
<input type="checkbox"/>	25/10/2019 12:59	-	1040	Purchasing Meat & Poultry - Beef	Beef production for Supermarket 1 - Beef Production for abattoir 1 - Product for demooo stores - Service Order	Abattoir 1 User 1 Abattoir	14/10/2019 08:00	Finalised Confirmation Note Sent		
<input type="checkbox"/>	11/10/2019 10:24	-	1033	Purchasing Meat & Poultry - Beef	Beef production for Supermarket 1 - Beef production for our own retail stores - Make sheet for abattoir 1 - Service Order	Abattoir 1 User 1 Abattoir	12/10/2019 08:00	Finalised Confirmation Note Sent		
<input type="checkbox"/>	11/10/2019 08:59	-	1031	Purchasing Meat & Poultry - Beef	Beef production for Supermarket 1 - Make sheet for Abattoir 1 with product for Supermarket 1 - Service Order	Abattoir 1 User 1 Abattoir	10/10/2019 08:00	Finalised Confirmation Note Sent		

4.4 VIEW

Step 1: Under the ‘Trading and Planning’ section of the site click Sent Orders or select Sent Orders from the header bar as per the below.

Step 2: Find the relevant order and select View.

Order Manager

Templates Multi Order Drafts → Sent Orders ← Received Orders Activity Admin

Currently viewing ALL SITES sent orders Change Site Viewing 41 results | Page 1 of 2

Sent Between: Delivery Between: Production Between: Order Type: All Product Category/Type: All Template: All Company: All Search: Filter
 Sent By: All Sent To: All Delivered To: All Status: All Products: All Clear Filters

Delete Selected Upload Confirmation Note Notify Selected Bulk Update Export Selected

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action	
<input type="checkbox"/>	07/10/2024 21:13	-	2133	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	
<input type="checkbox"/>	07/10/2024 20:40	-	2132	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	

View (highlighted in red box with arrow)

- Response
- Update Details
- Edit Customer Reference
- Amend
- Finalise

Step 3: If RCTI is part of your company’s subscription and setup at the template level, click RCTI View. You can print the RCTI or export the RCTI to PDF.

Export to PDF **RCTI View**

Cook Purchasing Order

Date: 05/02/2024 04:44
 Order Number: 152
 Order Title: Cook Purchasing Order
 Sent By: James Hennessy - Foods Connected Ltd
 Sent To: COOK - Buying Team
 Status: Confirmed
 Purchase Date: 02/02/2024 09:00

General Notes
 05/02/2024 04:44:56 James Hennessy These are the general notes

Products Lines

Product	Price	Requested Quantity	Actual Quantity	Comments	Requested Delivery Date - Time	Net Value	Tax	Gross Value
1000901 - TX18 Fin 10 Breaded Chicken Skewers	£ 10.00/Kg	10.00 Kg	0.00 Kg	N/A	05/02/2024 09:00	£ 100.00	19.00%	£ 119.00
1000903 - TX18 Fin Duck Sel 6x204g	£ 11.00/Kg	20.00 Kg	0.00 Kg	N/A	05/02/2024 09:00	£ 220.00	19.00%	£ 261.80
1000904 - MX18 10 Bthy Prawn Sel 4x205g	£ 12.00/Kg	30.00 Kg	0.00 Kg	N/A	05/02/2024 09:00	£ 360.00	19.00%	£ 428.40
Total						£ 680.00		£ 809.20

Contact Information
 Foods Connected Ltd
 Ground Floor, Old City Factory, Patrick Street, Londonderry, Derry, BT48 7EL, United Kingdom
 COOK
 The COOK Kitchen, Eurolink Way, Sittingbourne, Kent, ME10 3HH, United Kingdom
 Generated by foodsconnected.com

Print Export to PDF

Recipient Created Tax Invoice

Cook Purchasing Order

Sent By: James Hennessy - Foods Connected Ltd
 Site Name: Foods Connected Ltd (Group)
 Site Address: Ground Floor, Old City Factory, Patrick Street, Londonderry, Derry, BT48 7EL, United Kingdom
 Site Tel No:
 Site Fax No:
 Site ABN:
 Supplier Name: COOK - Buying Team
 Supplier Address: The COOK Kitchen, Eurolink Way, Sittingbourne, Kent, ME10 3HH, United Kingdom
 Supplier ABN:

Recipient Created Tax Invoice

Invoice Date:
 Invoice Number: FC-152-1
 Order Number: 152
 Status: Confirmed
 Actual Quantity: 0 Kg
 Kill Date:

Gross Amount Excluding GST: £ 0.00
 GST Amount: £ 0.00
 Gross Amount Including GST: £ 0.00

Deductions

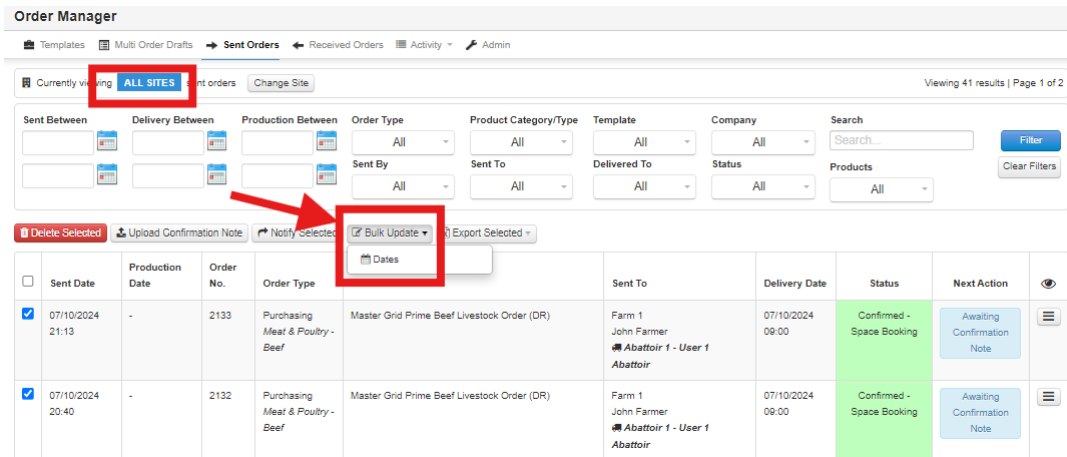
Cattle Levy (GST 0%): £ 0.00

Total Amount Excluding GST: £ 680.00
 Total GST Amount: £ 129.20
 Total Amount Including GST: £ 809.20

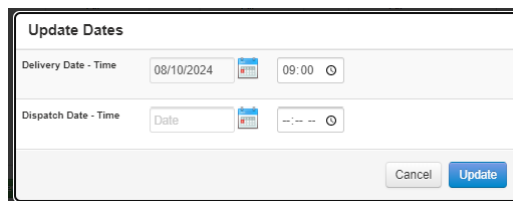
Contact Information
 Foods Connected Ltd
 Ground Floor, Old City Factory, Patrick Street, Londonderry, Derry, BT48 7EL, United Kingdom
 COOK
 The COOK Kitchen, Eurolink Way, Sittingbourne, Kent, ME10 3HH, United Kingdom
 Generated by foodsconnected.com

4.5 BULK UPDATE DATES

Step 1: Select Bulk Update and click 'Dates'.



Step 2: Update delivery/dispatch date and click 'Update' to save.



4.6 BULK UPDATE DETAILS

This functionality will appear on the screen if the master grid feature is included in your company's subscription.

Step 1: Select a single site in the top left of the filter section. Choose the orders you want to update. Click on 'Bulk Update' and then select 'Details'.

Order Manager

Templates Multi Order Drafts **Sent Orders** Received Orders Activity Admin

Single Site Only Viewing 41 results | Page 1 of 2

Sent Between: [] Delivery Between: [] Production Between: [] Order Type: All Product Category/Type: All Template: All Company: All Search: [Search...] Filter

Sent By: All Sent To: All Delivered To: All Status: All Products: All Clear Filters

Delete Selected Upload Confirmation Note Notify Selected **Details** Bulk Update Export Selected

	Sent Date	Production Date	Order No.	Order Type		Sent To	Delivery Date	Status	Next Action	
<input type="checkbox"/>	07/10/2024 21:13	-	2133	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	
<input type="checkbox"/>	07/10/2024 20:40	-	2132	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	

Step 2: Select the master grid and click 'Update'.

Update Details

Linked Master Grid: -- No Master Grid --

Cancel Update

4.7 TRANSFER INTAKE DATA

Step 1: Ensure that 'Transfer Intake Data' is turned ON in the admin section to use this functionality.

Order Manager

Templates Multi Order Drafts Sent Orders Received Orders Activity **Admin**

General

Confirmation Names

Auto Finalise

Order Lists Optional Columns

Order View Configuration

Setting	Option
Order Numbers <i>Manual entry - A order number must be manually entered when issuing an order</i> <i>Auto-generated - An order number will be automatically generated by Foods Connected</i> <i>From reserved list - An order number will be selected automatically from a reserved list</i>	<input type="radio"/> Manual Entry <input checked="" type="radio"/> Auto-generated <input type="radio"/> From reserved list
Order Number Re-finalised Incrementation <i>Append re-finalised order with an incremental counter on the order number</i>	<input type="checkbox"/> Off
Issue Order Types <i>Negotiation Orders - The supplier will be able to respond to the order. The supplier can negotiate quantities and prices, accept or decline items, etc.</i> <i>Pre-confirmed Orders - The order will automatically be set to the status 'Confirmed'</i>	<input checked="" type="radio"/> All <input type="radio"/> Negotiation Orders <input type="radio"/> Pre-confirmed Orders
Multi Order Drafts - Create and issue multiple orders for one or more suppliers over a set date range	<input checked="" type="checkbox"/> On
Multi Order Duplicate Check Override - Allow more than one price per purchase date, per product identifier	<input type="checkbox"/> Off
Multi Order Delivered To Override - Overrides Supplier/Customer Delivered To functionality within multi order excel import	<input type="checkbox"/> Off
Supplier/Product Links Required - A supplier and product must be linked before an order can be issued	<input type="checkbox"/> Off
Supplier Reference Required - Adds an option to order templates to set whether a supplier reference is required before an order can be finalised	<input type="checkbox"/> Off
Customer Reference Required - Adds an option to order templates to set whether a customer reference is required before an order can be finalised	<input checked="" type="checkbox"/> On
View & Finalise Multiple Orders - Allows the view & finalization of multiple orders at once	<input type="checkbox"/> Off
Custom Fields - Set custom fields in the admin section which can be used within orders	<input type="checkbox"/> Off
General Notes in Confirmation Email - Confirmation Email to include General Notes	<input checked="" type="checkbox"/> On
Modify General Notes - Allows the general notes to be modified when an order is in an open state	<input type="checkbox"/> Off
Modify Product Comments - Allows the product comments to be modified when an order is in an open state	<input type="checkbox"/> Off
Transfer Intake Data - Allows intake data to be transferred between products within an order	<input checked="" type="checkbox"/> On
Bulk Update Details - Allows the details of sent orders to be updated in bulk	<input checked="" type="checkbox"/> On
Show Full Intake Data - When viewing an order, the full detail of the intake will be displayed by default, rather than only the condensed summary	<input type="checkbox"/> Off

Step 2: Go to the 'Sent Orders' screen and select the order for which you want to transfer intake data. Click 'Confirmation Note Sent'

The screenshot shows the 'Order Manager' interface with a list of orders. The third order is highlighted with a red box and a red arrow pointing to the 'Confirmation Note Sent' status.

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action	
<input type="checkbox"/>	25/05/2021 23:11	-	1018	Purchasing Vegetables	Produce Purchase - Carrots, leeks, cauliflower, onions	Mixed Produce Sean Pearse Demo Site (Group)	26/05/2021 03:00	Confirmed Confirmation Note Sent	Finalise	
<input type="checkbox"/>	24/03/2021 10:08	-	460-92330	Purchasing Clothing	Clothing Purchase Orders	Huafang Textile Co Ltd. Marc Lauren Clothing	13/09/2020 03:00	Confirmed Confirmation Note Sent	Finalise	
<input type="checkbox"/>	22/02/2021 19:27	-	162	Purchasing	Over the Hooks Purchase - Blue Sky Meats	JBS Lauren Neill Abattoir 1 - User 1 Abattoir	23/02/2021 03:00	Confirmed Confirmation Note Sent	Finalise	
<input type="checkbox"/>	05/02/2021 09:14	30/01/2021	159	Stock Transfer	Fletchers International Dubbo Transfer to CRM - Fletchers International Dubbo Transfer to CRM - Blue Sky Meats - Saturday 30th Jan 2021	Internal Demo Co - Factory 2 - Commercial	31/01/2021 03:00	Confirmed Confirmation Note Sent	Finalise	
<input type="checkbox"/>	28/01/2021 22:11	27/01/2021	153	Sales Meat & Poultry - Lamb	Lamb Sales Order from Lamb Carcass - 22.4 kg - Blue Sky > Lamb Carcass > Production Plan - Demo 1	Abattoir 1 Cold Store - User 1 Cold stores	28/01/2021 03:00	Confirmed Confirmation Note Sent	Finalise	

Step 3: Go to 'Transfer'. You have two options here:

- Selected Intake Data: This option allows you to transfer selected intake data to a new product code within an order.
- All Intake Data: This option allows you to transfer all intake data to a new product code within an order.

Order Manager - JBS Beef - Over the Hooks Purchase - Blue Sky Meats

← Back

Templates Multi Order Drafts → Sent Orders ← Received Orders Activity Admin

Save & Exit Save & Finalise

Intake Data - Car 603 - Lamb Carcass

Total Animals	10
Total Weight	232.20 Kg
Average Weight	23.22 Kg
Total Cost	AUS\$ 1,509.30
Average Price	AUS\$ 0.50
No. of Condemned	0

No. of Dead on Arrival / Comment: 0 Enter a dead on arrival comment... (optional)

No. of Dead in Yard / Comment: 0 Enter a dead in yard comment... (optional)

No. of Euthanised: 0

Variance / Comment: 0 Enter a variance comment... (optional)

Import Intake Data Deleted Selected Export to Excel

Transfer... Selected Intake Data All Intake Data

Kill Date	Animal ID	Body No	Lot No	Se	Buy Fields	Condemned	Dirty Grade	Agreed Price	Price Adjustment(s)	Final Price
01/06/2020	2438159	1				No		0.50	Gnd: 0	0.50

Total: 0.00

Step 4: Once you select one of the options above, click the new product and then click 'Transfer'.

Transfer Intake Data

Transfer this intake data to another livestock product

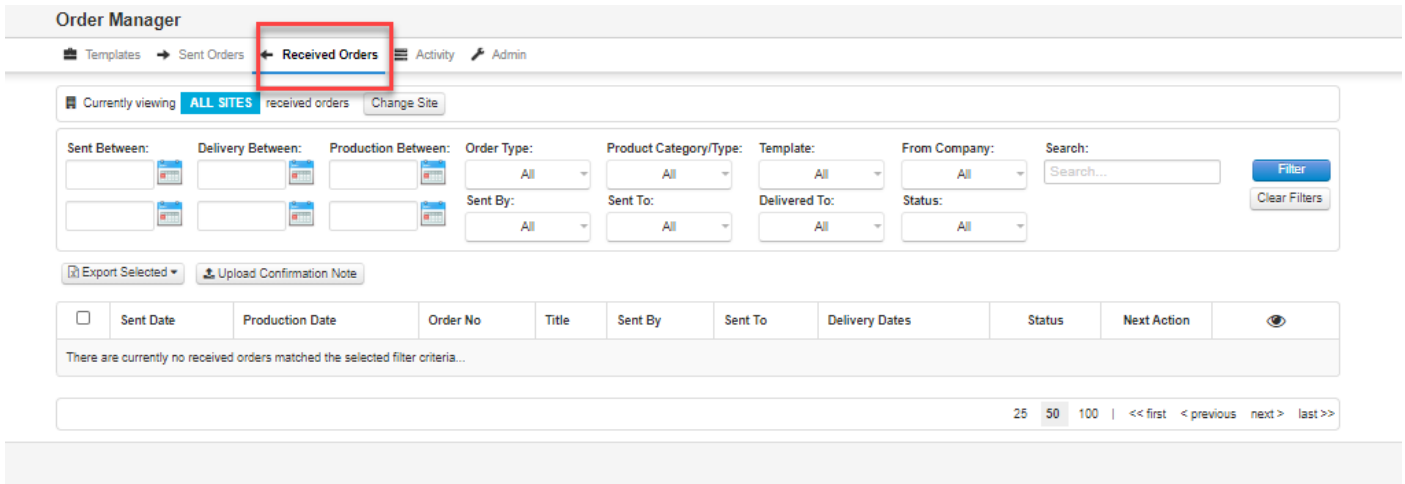
Select Product: NEW PRODUCT CODE

Cancel Transfer

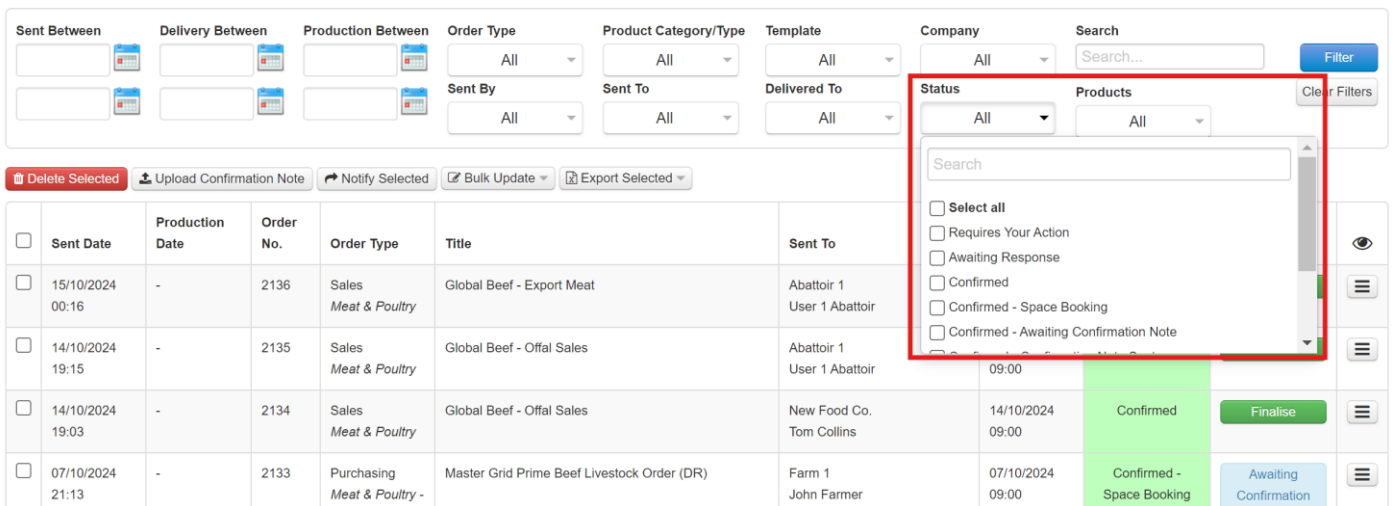
5. RECEIVED ORDER

5.1 VIEW

Step 1: Under the 'Trading and Planning' section of the site click Received Orders or select Received Orders from the header bar as per the below. Selecting Received orders will show all of the orders that have been sent to the user.



Step 2: Once you have selected Received Orders you will be able to filter by the status of bar as per the below to select the type of received order.



5.2 UPLOADING A CONFIRMATION NOTE

Step 1: Refer to section 4.2 for process

5.3 SUPPLIER CONFIRMATION MASS UPLOAD

Step 1: Change the filter to Confirmed – Awaiting Confirmation Note and then select the orders you would like to mass upload a confirmation note to. Then click Upload Confirmation Note.

Currently viewing ALL SITES sent orders Change Site Viewing 10 results | Page 1 of 1

Sent Between Delivery Between Production Between Order Type Product Category/Type Template Company Search Filter

Sent By Sent To Delivered To Status Products Clear Filters

Delete Selected Upload Confirmation Note Notify Selected Bulk Update Export Selected

<input type="checkbox"/>	Sent Date	Production Date	Order No.	Order Type	Title	Sent To	Delivery Date	Status	Next Action	
<input checked="" type="checkbox"/>	07/10/2024 21:13	-	2133	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	
<input checked="" type="checkbox"/>	07/10/2024 20:40	-	2132	Purchasing Meat & Poultry - Beef	Master Grid Prime Beef Livestock Order (DR)	Farm 1 John Farmer Abattoir 1 - User 1 Abattoir	07/10/2024 09:00	Confirmed - Space Booking	Awaiting Confirmation Note	
<input checked="" type="checkbox"/>	01/10/2024 03:51	-	2129	Purchasing Meat & Poultry - Beef	Prime Beef Livestock Order (DR)	Farm 1 John Farmer Demo Site (Group)	08/10/2024 09:00	Confirmed	Confirmation Note	
<input type="checkbox"/>	01/10/2024 03:50	-	2128	Purchasing Meat & Poultry - Beef	Prime Beef Livestock Order (DR)	Farm 1 John Farmer Demo Site (Group)	08/10/2024 09:00	Confirmed	Confirmation Note	

Step 2: Add in the details that are required on the Multi Confirmation Note Import.

Multi Confirmation Note Import

Confirmation Details

Dispatch/Receipt Date: 22/10/2024

Import File: Download Import Template

Overwrite Existing Confirmation: No

Order Details

You do not have permission to add a confirmation note to the following order(s):

- Master Grid Prime Beef Livestock Order (DR)
- Master Grid Prime Beef Livestock Order (DR)

Cancel Import

Dispatch / Receipt Date: Select the dispatch / receipt date

Import File: Select choose file if it is saved on your computer.

Download Import Template: Download the import template and add in the required information for the corresponding orders.

Overwrite Existing Confirmation: By selecting yes it will overwrite any preview orders that have a confirmation note uploaded against it.

Dispatch Reference: Input the dispatch for the orders selected.

Step 3: Once you have inputted all the information select import.

5.4 EXPORTING A RECEIVED ORDER

Step 1: Once you have selected Received Orders you will be able select the order that you would like to export out the details. Click the export / import as per the below screenshot

Add new general note:

Products Lines

Product	Price	Requested Delivery Date - Time	Requested Quantity	Total Confirmed Quantity	Action
B8903 - AA/Finest TTS	£ 6.46/Kg	19/04/2021 09:00	100.00 Kg	343.00 Kg	Action ▼ 1
B8736 - AA Finest Topside for roasting joints	£ 6.46/Kg	19/04/2021 09:00	100.00 Kg	257.00 Kg	Action ▼ 2
B8306 - Finest Topside for Roasting Joints	£ 6.46/Kg	19/04/2021 09:00	100.00 Kg	23.00 Kg	Action ▼ 1
B8678 - AA Finest Hip Hung Topside for Joints	£ 6.46/Kg	19/04/2021 09:00	100.00 Kg	100.00 Kg	Action ▼ 1

Buttons: Cancel Save Preview & Send Response

Export / Import dropdown menu options: Export Order Template, Import Order

6 ACTIVITY

Step 1: Go into 'Trading and Planning' and select activity or select it on the header tab. Selecting activity will take you to the page below which will show the latest activity for all orders in the order manager. You can filter by date, template and user. This allows you to track changes on orders and who was responsible for the change.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ James ▾

Order Manager

Templates Multi Order Drafts → Sent Orders ← Received Orders **Activity** Admin

Between Dates: Template: All User: 2 selected Action: All Search: Filter Clear Filters

Activity Subscriptions [Export to Excel](#)

Date	Order No.	Order	Action	
01/03/2024 09:05	2026	P Vannemei - Purchase Order Template	User 1 Abattoir 2 sent a confirmation note	View Order
01/03/2024 08:53	2027	P Vannemei - Purchase Order Template	User 1 Abattoir 2 responded to an order from Paul Armstrong	View Order
01/03/2024 08:52	2027	P Vannemei - Purchase Order Template	User 1 Abattoir 2 added the order item: 1000178 - Line Caught Cod with quantity: 0.000 Kg at price: 0.020000/Kg	View Order
04/07/2023 02:18	1999	Prime Beef Livestock Order (DR)	User 1 Abattoir sent a confirmation note	View Order
03/07/2023 06:28	1992	Prime Beef Livestock Order (DR)	User 1 Abattoir sent a confirmation note	View Order

Step 2: If you select View order it will take you to the order that was changed.

6.1 USING FILTERS

Step 1: Filters allow you to quickly search and find orders in the order manager. They allow you to identify certain parameters so you can find the relevant orders. The filters change depending on what area of the system but their core functionality is the same. For the below example you can search by:

Order Manager

🏠 **Templates** → Sent Orders ← Received Orders ☰ Activity ✎ Admin

Site: Demo Co (Group) ▾	Order Type: Purchasing ▾	Product Category / Type: All ▾	Linked Supplier/Customer: All ▾	Created By: All ▾	Last Edited By: All ▾	Filter
Search Search Template Names... 🔍						Clear Filters

Site: Select which site to filter from

Order Type: Select what type of order eg; purchasing

Product Category: Filter by product category

Linked Supplier / Customer: Select by a supplier or customer

Created By: Filter by the user who created the template

Last Edited By: Filter by who last edited the template