

Order Summary-Fulfillment View

Overview

When creating a new invoice, the system allows you to quickly identify when there are Prebooks pending to be billed for the days selected in the **Order Summary** filters.

Prebooks Pending to be Billed

Information

The following steps only apply when the setting sell by units only is disabled.

1

Go to **Order Entry>>Order Summary**.

2

Notice the message "**There are X prebooks that are pending to be billed for the orders dates selected**". When you filter by customer, salesperson, or prebook #, the system will display the pending Prebooks for the selected customer in the dates range.

3

Once you click on the number of Prebooks pending to be billed two different behaviors can occur, depending on the user role:

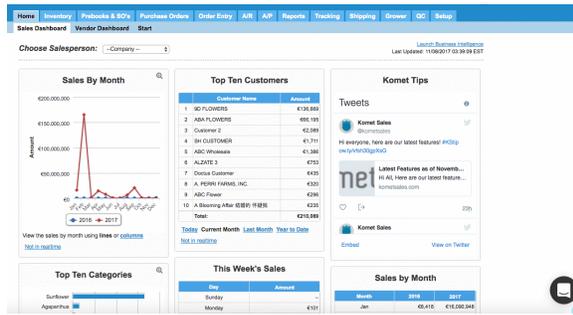
- **Sales Allocation, Admin, Sales Manager:** the system will take the user to the Allocations view, with the same filters applied on the Order Summary so they can complete the Prebooks pending to be billed.
- **Salespeople:** the system will take the users to the [Prebooks Fulfillment view](#), where users will be able to see the Prebook details and mark it as completed.

Related Articles

- [Data Import](#)
- [Fulfillment View](#)
- [How to Export Invoice Orders Details](#)
- [How to Print Using Remote Printers](#)
- [How to Search for Orders from the Add Order Screen](#)
- [Order Summary-Fulfillment View](#)
- [Order Summary: Invoices Printing and Filters](#)
- [Prebooks in Units Pending to be Billed](#)
- [Shipping - Excel Order Summary Report](#)
- [Shipping Order Summary](#)

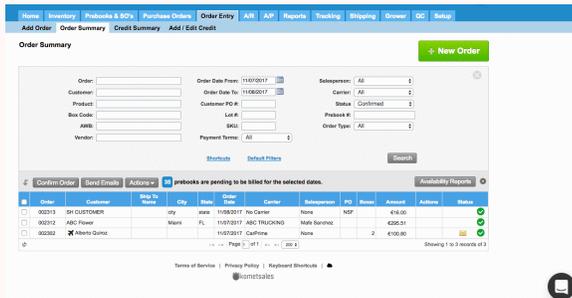
Roles enabled to perform this action:

Admin, Sales
Manager, Cashier,
Sales, Allocations.



Important

When the setting **Sell by units only** is enabled and you click on the **Prebooks pending to be Billed** message, the **Prebook Orders** window will be displayed where you can see the Prebook orders according to the days selected. Once you click on **Process Order**, the system will take you the Prebooks Fulfillment view for Prebooks in boxes. Remember to complete the order you can go to the Allocation view. In the case of Prebooks in units, the system will take you to the **Add Order** window to complete the order directly. Notice that you also have the option of postponing the Prebook from the Actions column. Please consider that this option will postpone the entire Prebook and not only the items in units for 1 day. You can postpone a Prebook as many times as you want to.



Fulfillment View-Multilocation Companies

In the case of **Multilocation Companies**, when the setting Sell by Units Only is enabled for a least one of the locations having pending orders, the system will also pop up the previous window (Prebook Orders) when clicking on the number of Prebooks pending to be billed. On the other hand, if the Prebook item is in boxes, and the setting Sell by Units only is disabled, the system will take you to the [Prebooks Fulfillment view](#) or the Allocations view, depending on the user role.

Boxes in Transit

When the setting *Warn users when confirming orders that contain items that have not been scanned inbound* is enabled (**Setup>>Settings>>Order Entry Options**) the system will show an airplane icon, warning users that the order has at least one box still in transit.

The screenshot shows the 'Order Summary' page with a search filter for 'Boxes in transit'. The table below shows the results:

Order #	Customer	State	Order Date	Salesperson	PO	Boxes	Amount	Actions	Status
00911	Customer 2	FL	02/22/2017	Karla Hernandez		100	\$20,809.50		✓
00889	CD Flower Shop	FL	02/17/2017	Danny Rodriguez			\$97.50		⚠
00888	CD Flower Shop	FL	02/17/2017	Danny Rodriguez		1	\$85.54		⚠
00888	Boxes in transit	FL	02/17/2017	Danny Rodriguez		0	\$0.00		✈
00888	Customer 2	FL	02/14/2017	Karla Hernandez		2	\$108.41		⚠

Substitution Mark-Order Summary

The system displays a Sub Mark in the status column when a least one of the items in the order has been substituted.

The screenshot shows the 'Order Summary' page with a search filter for 'Sub'. The table below shows the results:

Order #	Customer	State	Order Date	Salesperson	PO	Boxes	Amount	Actions	Status
00885	Customer 4		02/11/2017	None			\$34.43		✓
00823	Customer 4		01/26/2017	None		20	\$306.50	Sub	⚠
00822	Customer 4		02/01/2017	None			\$37.47		⚠
00819	Customer 4		01/05/2017	None		1	\$405.00		⚠
00818	Customer 4		01/05/2017	None			\$0.00		⚠
00813	Customer 4		01/29/2017	None			\$0.00		⚠
00812	Customer 4		01/29/2017	None			\$0.00		⚠
00797	Customer 4		01/27/2017	None			\$112.12		⚠
00796	Customer 4		01/27/2017	None		5	\$25.00	Sub	⚠
00788	Customer 4		01/23/2017	None		1	\$159.24		⚠
00780	Customer 4		01/18/2017	None			\$0.00		⚠
Totals:						27	\$1,134.34		