

Prebooks in Units Pending to be Billed

Overview

The system allows you to quickly identify the Prebooks pending to be billed in units when creating an invoice.

Main Actions

Invoicing Prebooks in Units Important

The following process only works when the setting **Sells By Units Only** is enabled. If the setting is disabled and you click on the number of Prebooks pending to be billed, two different behaviors may happen, 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.

1
Go to **Order Entry>Add Order**.

2
Select a customer.

3
Once you select the customer, the system will display a message with information about the Prebooks pending to be billed for yesterday, today, tomorrow, and for the date selected in the filter. If there are no Prebooks pending for those days, the system will display the message **"This customer doesn't have any items pending to be billed"**.

4
Click on the number according to the day where you want to complete orders. In this case, we are going to complete Prebooks from today. When you click on the number, the window **Items Pending to be Filled** is displayed. This window is similar to the window that appears in the Allocations View but just for Prebooks in units. Use the available filters for find Prebooks in units pending to be filled and click on **Search**.

5
Select the Prebook you want to invoice. Proceed to select the quantity to be billed and go to the **Actions** column and click on **Add**. Once you do that, the Prebook item will be added to the invoice. If you are done, click on **Close**. The system will default the salesperson and sales code of the first Prebook added to the order.

Postponing a Prebook

There are two available options to postpone a Prebook: from the **Add Order** screen or from the **Order Summary** screen. Both options need to have the Sell by Units Only setting enabled.

1) Postpone a Prebook from the Add Order window:

The system allows postponing a Prebook from the **Items Pending to be Filled** window. This option will only postpone Prebook items in units still pending to be billed. The item will be postponed for the next day.

1
Go to **Order Entry>>Add Order**. Select the customer and click on the message that informs about **Pending Prebooks**.

Related Articles

- [Allocations](#)
- [Allow Building Boxes from Units](#)
- [Boxes Allocation](#)
- [Boxes Allocation of Prebooks in Units](#)
- [Building Boxes from Inventory Units](#)
- [Customer PO - Required Field](#)
- [FAQ's for Sales Processes](#)
- [Fill From Open Market](#)
- [Fulfillment View](#)
- [How Does the System Assign the Unit Price Once a Box is Opened?](#)

Roles enabled to perform this action: Admin, Sales Manager, Cashier, Sales, Allocations.

2

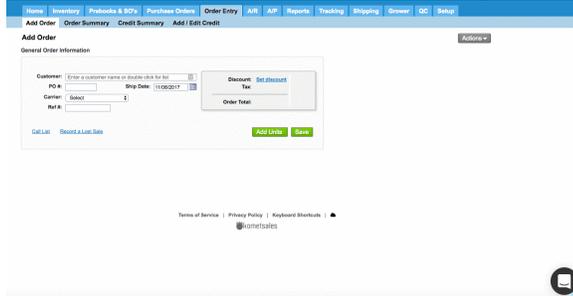
Select the Prebook line (or lines) you want to postpone. Go to the **Actions** column (or the **Actions** drop-down menu) and click on **Postpone**.

3

When you click on **Postpone**, the system will ask you for a confirmation. Click on **Continue**.

4

Now the product has a truck date for the next day. Notice the system created a new Prebook with the same information since there were no Prebooks created yet. In case there is another Prebook with the same customer, carrier and truck date (the next date), the system will add the items postponed to that Prebook.



2) Postpone a Prebook from the Order Summary Window

This option applies for Prebooks having items in units but **will postpone the entire Prebook**. Users can Postpone a Prebook from this option as many times as they want.

1

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

2

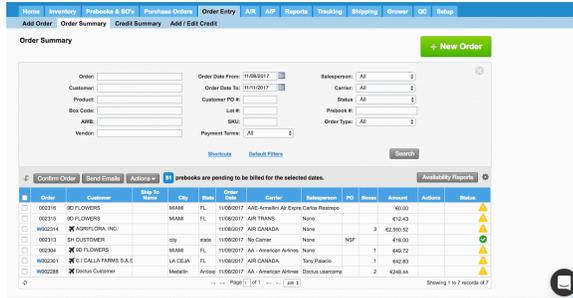
Click on the number of Prebooks Pending to be billed.

3

The Prebook Order window will open. Use the available filters to find the Prebook to postpone. Click on **Postpone** on the **Actions** column.

4

A confirmation window will appear. Click on **Continue** to finish.



Information

In the Prebook Summary, a color indicator will appear next to the Truck date indicating that a Prebook has been postponed for 1, 2 or 3 days.

- **Yellow:** The prebook was postponed for 1 day.
- **Orange:** The prebook was postponed for 2 days.
- **Red:** The prebook was postponed for 3 days.

Prebook Summary

View the prebooks in the Standard view, Fulfillment view or the Allocations view

Prebook # [] Truck Date From: 12/01/2016 Truck Date To: 01/03/2017

Customer: Flores Las pasas Carrier: All Salesperson: All

Product: [] SO #: [] Customer PO #: []

Brand: All Price Status: All

Export to Excel Export Details Actions

Prebook #	SO #	Customer	Carrier	Truck Date	Salesperson	Total	Quantity	Comments	Actions
041104		Flores Las pasas	Florida Beauty	Thu 12/08	Danny Lombardo	\$185.00	50		
041103		Flores Las pasas	Carrier 1	Fri 12/05	Danny Lombardo	\$38.00	4		
041102		Flores Las pasas	Carrier 1	Tue 12/07	Danny Lombardo	\$30.00	3		
041101		Flores Las pasas	C1 Trucking	Tue 12/07	Danny Lombardo	\$24.00	5		
041100		Flores Las pasas	American Airlines	Mon 12/08	Danny Lombardo	\$134.00	20		
041091		Flores Las pasas	Florida Beauty	Sat 12/01	Danny Lombardo	\$145.00	50		
038420	S13995	Flores Las pasas	Arnellini	Thu 12/09	None	\$225.00	15		
038081	S13995	Flores Las pasas	Arnellini	Thu 12/02	None	\$225.00	15		
038441	S13995	Flores Las pasas	Arnellini	Thu 12/02	None	\$225.00	15		
038085	S13995	Flores Las pasas	Arnellini	Sat 12/03	None	\$225.00	15		
037728	S13995	Flores Las pasas	Arnellini	Sat 12/03	None	\$225.00	15		
						Totals	\$1,441.00	207	

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Shortcuts

Once you open the window **Items Pending to be Filled** and you want to change the day is not necessary to go back to the **Add Order** Window. Click on the shortcuts window and select the day you want to see the pending orders.

Items Pending to be Filled

Customer: Flores Las pasas - Modelin [142102]

Truck Date From: 12/01/2016 Truck Date To: 12/30/2016 Product: []

Prebook #: [] Shortcuts Search Clear

Actions Yesterday Today Tomorrow This screen only shows Prebooks in Units.

Prebook #	Customer PO #	Carrier	Truck Date	Product	Quantity	Price	Actions
037728		Arnellini	12/03/2016	Carmanon 55 cm Assorted	15 Bunch	\$225.00	
038085		Arnellini	12/08/2016	Carmanon 55 cm Assorted	15 Bunch	\$225.00	
038801		Arnellini	12/22/2016	Carmanon Assorted 55 cm	15 Bunch	\$225.00	
041104		Florida Beauty	12/29/2016	Rosa Red 50 Cm	50 Stem	\$155.00	

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Adding Several Prebooks to the Order

The system allows adding more than one item at once. To do that, click on the number of prebooks pending for a given day, select the Prebook item you want to invoice, go to the **Actions** column and click on **Add to Order**.

Sales Dashboard

Choose Salesperson: []

Today's Sales: \$3 (0% GPM)

GPM: Current Month: \$175.12, Last Month: \$98.12, Year to Date: \$1,791.00

This Week's Sales: \$1,791

Sales by Month: \$200,000.00

Marking a Prebook as Complete

The system also allows to mark a Prebook as complete and it will no longer appear as pending to be billed. This action can also be executed from the **Fulfillment View**.

1

Once you are in the **Items Pending to be Filled** window, select the Prebook line you want to mark as completed. Go to the **Actions** drop-down menu and click on **Mark as Completed**.

2

The system will ask you for a confirmation. Once you are sure, click on **Continue**.

Add Order Actions

General Order Information		Invoice: 002218 <small>Printed</small>		General Customer Information	
Customer: SD FLOWERS	Ship Date: 1/18/2017	Order Subtotal: €2.00	Invoice #: 002218	Salesperson: Not set	
PO #: <input type="text"/>		Discount: 0.00		Shipping Address: 222 W. 2ND AVE MILWAUKEE WI 53212	
Carrier: ABC TRUCKING		Tax: €0.00		Payment Method: Not set	
Ref #: <input type="text"/>		Order Total: €0.00		City: Not set	
Call Us Request a Call Back Add Units Close Save Print Confirm New Order		Add additional charges		Name: Not set	
There are 0 items that are pending to be billed for today.				Phone: 0000000000	
				Fax: Not set	
				View customer details, orders, orders or invoices	
				Change data in my account	

Boxes

It seems that you haven't added any boxes to this invoice. Would you like to [add some boxes?](#)

Units

It seems that you haven't added any units to this invoice. Would you like to [add some units?](#)

