

USER MANUAL CREATE ORDERS

Create Orders

Orders

The screenshot shows the 'Orders' menu with several sections and callouts:

- 1**: A red box highlights the 'CUSTOMER LOOKUP' section, which includes a search field for name, email, phone, or code, a 'Sites' dropdown, and an 'Orders / Quotes' dropdown.
- 2**: A red box highlights the 'ORDER DETAILS' section, which contains fields for Unique ID, Date, Site Size, Waste Type, Street Number, Unit / Lot (optional), Street Name, Postcode, Town / City, Suburb, State, Delivery Date, and Collection Date.
- 3**: A red box highlights the 'Find Bin Price' button at the bottom left.
- 4**: A blue button labeled 'Convert to Order' is shown below the main form.
- 5**: Three buttons are shown below the main form: 'Choose Payment' (blue), 'Save As Quote' (green), and 'Save As Draft' (blue).

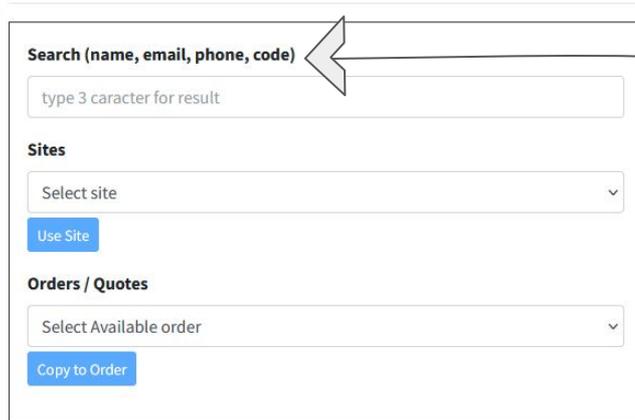
This is the “Orders” menu. In the menu there are several actions including :

1. Customer Lookup
2. Order Details Form
3. Find Bin Price
4. Convert to Order
5. Choose payment, Save As Quote and Save as Draft

1

Customer Lookup

CUSTOMER LOOKUP



The screenshot shows a web form titled "CUSTOMER LOOKUP". It contains the following elements:

- A search input field with the placeholder text "type 3 character for result". A large grey arrow points from the right side of the form towards this field.
- A section titled "Sites" containing a dropdown menu with the text "Select site" and a downward arrow, and a blue button labeled "Use Site".
- A section titled "Orders / Quotes" containing a dropdown menu with the text "Select Available order" and a downward arrow, and a blue button labeled "Copy to Order".

Use the "Customer Lookup" function to search for existing customers. This action allows you to quickly access information related to a particular customer, enhancing the customer service experience.

2

Find Bin Price

Find Bin Price **\$190**
best price found!

ADD DISCOUNT +

Extra Days **Extra Days Price**

Bin Price **Discount** % **Fixed Price**

CHOOSE EXTRA SERVICE

All **Product** Service

Search item

 Bed Base \$0	 Car Tyre \$10	 Truck Tyre \$25	 HaziBag - Asbestos \$0	 Travel per KM \$2.2
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Service Name	Type	Quantity	Price
<input type="text" value="Input service name"/>	<input type="text" value="Product"/>	<input type="text" value="Input Quantity"/>	<input type="text" value="Input price"/>

After you fill in the order details then you need to click on "Find Bin Price". This action will assist in locating the pricing information for a specific bin and waste type. It streamlines the process of providing accurate pricing details.

3

Convert to order

CUSTOMER DETAILS

Customer Name	Billing Address
<input type="text"/>	<input type="text"/>
	<input type="checkbox"/> Use delivery address as billing address
Email Address	Work Phone
<input type="text"/>	<input type="text"/>
<i>Site Contact</i> (<input type="checkbox"/> Use the billing Name and Phone number)	
Name	Phone
<input type="text"/>	<input type="text"/>

1

2

after you fill in all the customers details form then you can click the “Convert to Order” button to going to the payment process.

3

Choose Payment

Total Bin Size	\$215.00
Total Extra Days Fee	\$15.00
Total Extra Services	\$0.00
GST	\$20.91
Grand Total	\$230.00

[Choose Payment](#)[Save As Quote](#)[Save As Draft](#)

1

Select Payment Method

-  **Stripe Payment**
For secure payment with Stripe
-  **Bank Transfer**
Pay with direct transfer to bank account
-  **Cash**
Pay with cash

[Pay later](#)

2

On this process you will see the summary of the order that you made for the customers. To do the continue to the payment process click on “Choose Payment” button then you can select the payment method.