

# **C.S. PACKAGES**

## **BACK TO BACK ORDERING**

## **PROCEDURES**

## ➤ **Overview**

Back to Back ordering uses customer sales orders processed in Vision to create supplier purchase orders.

This is triggered for customers that have the Back to Back option set to Yes on the customer file.

You cannot create an order for a sales order that already has a purchase order.

There are 2 ways to use this program.

1. When a sales order is processed you will be asked "Process a back to back order?". If you answer Yes then the Sales Order selection screen will be opened and the saved order will be displayed.
2. Go to the top utilities menu and select Back to Back orders. This will open the sales order selection screen and all sales orders that do not have a back to back order will be displayed.

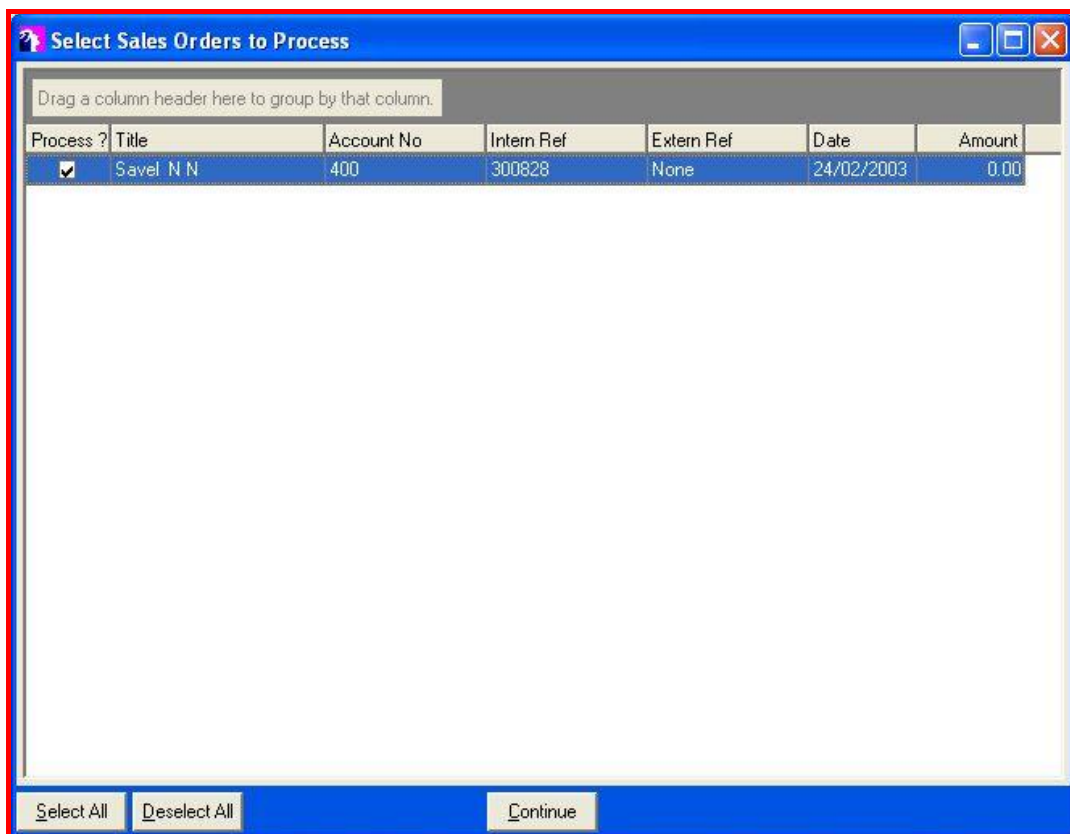
## ➤ Sales Orders

When this process is started you will get a list of all sales orders for Back to Back customers that have not yet had a purchase order created or a single sales order if this process has resulted from a sales order being processed.

Tick the process box to select orders to be included in this batch of orders or click select all to mark all orders on the grid for processing.

You can use grid options to rearrange the grid for this session by clicking on a column header to resort the grid or dragging headings into the top section to get various sales orders grouped together e.g. by customer or by date.

Click continue to proceed to the purchase order screen.



## ➤ Suggested Orders

This screen will display all the lines on selected sales orders. You must then select the lines to be ordered by clicking the Order column or the “Select All” button.

Once you have selected the details to be ordered you can preview or print the proforma orders. You can do this as many times as you require until Create orders is clicked.

Create orders will write the order into Vision and allow you the option to email the orders.

N.B. Your reference on the purchase orders will be the sales order reference plus a count of the number of orders created for that sales order.

e.g. If sales order S1234 creates 4 supplier orders because there are multiple suppliers, the first purchase order will have a reference of S1234 – 1/4. The second will have S1234 – 2/4 etc up to S1234 – 4/4.

Once orders have been created in Vision you can edit and reprint these via the edit purchase order functions within Vision.

