

Contextual help

Buttons for updating and edit

How to cancel an order?

The **Order Cancellation** process allows users to cancel an order that is no longer required.

Steps:

1. **Select the Order** - Locate and open the order that needs to be cancelled.
2. **Click on the Cancel Order button** - A confirmation box will appear.
3. **Choose the Cancellation Reason** - Select the appropriate reason from the dropdown or list.
4. **Confirm Cancellation** - Click **Yes** to proceed.

Once confirmed, the order status will be updated to **Cancelled** in the system, and no further actions can be taken on the order.

Note: An order **cannot be cancelled once it has been shipped**.

How to get IMEI of a IMEI scanned order?

The **IMEI Download** feature allows users to export the IMEI details of a selected order in Excel format.

Steps:

1. **Select the Order** - Locate and open the order from the list.
2. **Click on IMEI Download** - Found on the right side of the selected order.
3. **Confirm Download** - Click on **IMEI Download** again.

4. **Excel File Generated** - The IMEI details will be downloaded automatically in **Excel (.xlsx)** format.

Note: IMEI can only be downloaded **after the IMEIs have been scanned into the order.**

How to change Forwarder of already created order?

The **Change Forwarder** option allows users to update the logistics partner (forwarder) assigned to an order.

Steps:

1. **Select the Order** - Locate and open the order from the list.
2. **Click on Change Forwarder** - Opens the forwarder selection option.
3. **Select the Forwarder** - Choose the desired forwarder from the available list.
4. **Click on Submit** - The forwarder for the order will be updated in the system.

Note: Forwarder change may be restricted once the order is shipped.

How to update NetSuite in an order?

The **Update NS** option allows users to update or add the NS (NetSuite) ID for an order in the system.

Steps:

1. **Select the Order** - Locate and open the order from the list.

2. **Click on Update NS** - Opens the NS update option.
3. **Enter the NS ID** - Input the correct NetSuite ID.
4. **Click on Submit** - The NS ID will be saved and linked to the order.

Note: Ensure the entered NS ID is valid, as it will be used for synchronization and reporting.

How to duplicate an Order?

The **Duplicate Order** option allows users to create a new order by copying details from an existing one. This helps save time and ensures accuracy when placing similar or repeated orders.

Steps:

1. **Select the Order** - Locate and open the order you want to duplicate.
2. **Click on Duplicate Order** - A new order form will be generated with the same details as the selected order.
3. **Click on Submit** - The system will create a **Draft Order** with the same details.

Note: The duplicated order will be saved as a draft and assigned a new order reference number

How to download PI?

The **PI Download** option allows users to download the Proforma Invoice (PI) of an order. It can be generated either with prices visible or with prices masked, depending on the requirement.

Steps:

1. **Select the Order** - Locate and open the order from the list.
2. **Click on PI Download** - Found on the right side of the selected order.
3. **Choose Format** - Select either:
 - **With Price** - PI will display item prices and totals.
 - **Price Masked** - PI will hide all item prices and totals.

4. **Click on Download** - The PI will be generated and saved in **PDF format**.

Note: PI can only be downloaded once the order details are completed and saved.

How to change Shipping address?

The **Change Shipping Address** option allows users to update or modify the delivery address for an order before shipment.

Steps:

1. **Select the Order** - Locate and open the order from the list.
2. **Click on Change Shipping Address** - Opens the shipping address options.
3. **Select the Existing Address or Add a New One** - Choose from saved addresses or enter a new one.
4. **Click on the Confirmation Box** - The selected address will be applied to the order.

Note:

- The shipping address can only be changed **if a forwarder has not been added**.
- Once the order is shipped, the address cannot be updated.

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