

Salesman Using Order Manager

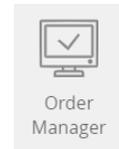
Welcome to *EZ-QC's Order Manager* for *EZ-Suite*. As a salesperson you can use this tool to access live information about your orders while they are in process, while also viewing and responding to any incoming requests from your production staff.

Logging In

You will use an email and be given a password on *EZ.Delivery* .

If you already use *EZ-Route* or *EZ-Runner*, this will be the same site and same login.

Once you have logged on to *EZ.Delivery* select the **Order Manager Icon** from the left side.



Select Order Manager



You will then need to make sure the **first drop-down box** in the top left has your yard name selected.

This may not be an option for all users.

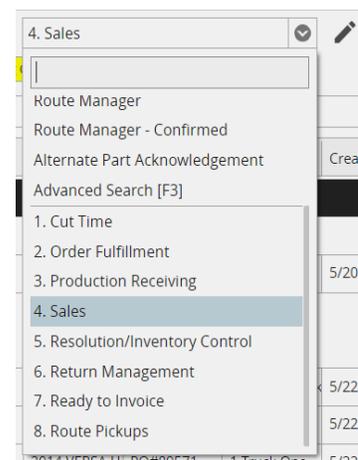
Select Your Filter

The second **drop-down box** is for you to select the correct filter, which is important. As a salesperson you will mainly use two filters, **Sales** and **Resolutions/Inventory Control**.

The **Quick Search** will pull up any order based on **Work Order#, Order# or PO#**.

Select Your View

The third **drop-down box** is for you to select your view. The view is how you can sort the columns and groupings that you are viewing on the screen. Views can be selected as a preset for specific filters.



Salesman Using Order Manager (cont'd)

You can select the **pencil** next to the right of the **filter drop-down box** to edit the filter and then check your name in the **Salesperson box** to see only orders that are for you, or next to the **View drop-down box** to edit the view by adding, removing, or rearranging columns, as well as specifying groupings and sort orders.

The **Type here to filter...** bar can sort through all the data currently being viewed and filter down to any orders matching what you have typed in. This bar is extremely useful. You can search for specific **Order #'s, customer or salesperson names, specific dates, delivery routes, or even part types.**

<input type="checkbox"/>	①			5/21 12:18	834994	<u>Drew King</u>	<u>Stalled</u>	BIRT'S AUT	638-1481H	PO#89510	PO #89510	3 Truck Th	[UNKNOW	Warehouse	3 Truck Th
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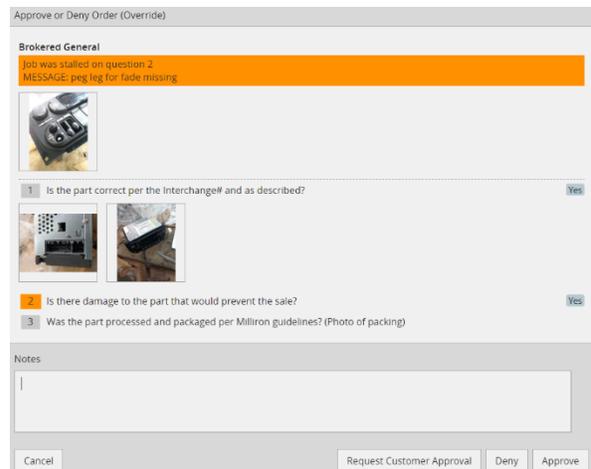
Responding to Stalled Orders

For salespeople, the most important job you have within *Order Manager* is responding to stalled orders.

An order is stalled whenever a processing question is answered in a way that requires approval.

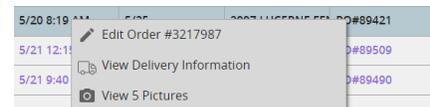
Stalled orders will congregate in your **Resolutions/Inv. Control filter** along with **cancelled, stopped, or replaced orders**. This will give you a desktop notification and turn the entire order line red.

Simply click on **Stalled** to view processing information and then select **Approve** (to allow the part to continue processing) or **Deny** (to stop the processing of that part).



View Delivery Information

You can right click on any order and view **Delivery Information** to quickly pull up any *EZ-Runner* or *EZ-Route* data connected with that order.



5/20 8:19	MM	5/20	638-1481H	PO#89421
5/21 12:18	MM	5/21	638-1481H	PO#89509
5/21 9:40	MM	5/21	638-1481H	PO#89490