Salesperson Guide to 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.
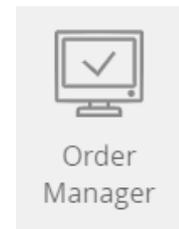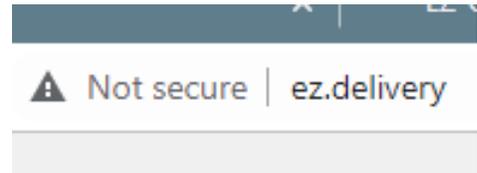
Logging In

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

If you see "not secure", type https://ez.delivery into your URL. This will help make sure the necessary notifications make it to you.

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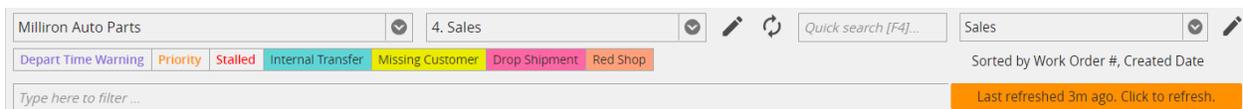
You will then need to make sure the first drop-down box in the top left has your yard name selected.

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**.

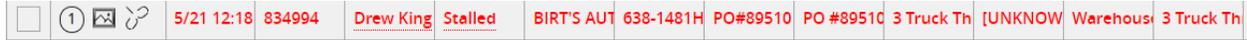The **Quick Search** will pull up any order based on **Work Order#, Order# or PO#**.

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.

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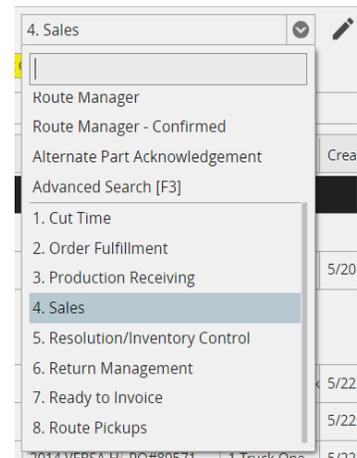
The **Type here to filter**... bar can sort through all the data currently being viewed and filter down to any orders matching what you have typed in**.** This bar is extremely useful. You can search for specific **Order #'s**, **customer or salesperson names**, **specific dates, delivery routes**, or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

| | ① | ⌖ | 5/21 12:18 | 834994 | Drew King | Stalled | BIRT'S AUT | 638-1481H | PO#89510 | PO #89510 | 3 Truck Th | [UNKNOW | Warehouse | 3 Truck Th |

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).
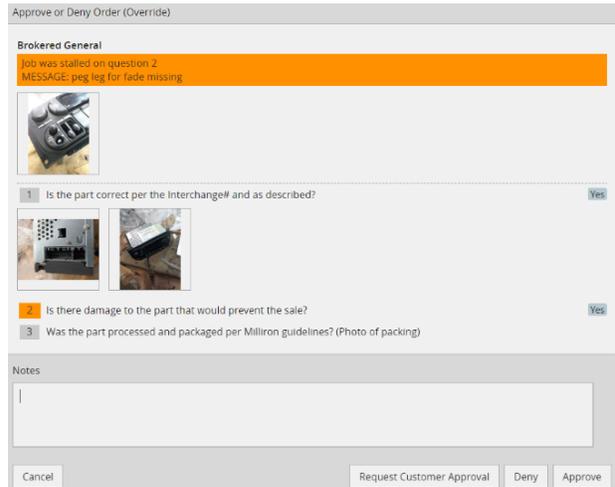
View Delivery Information

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.
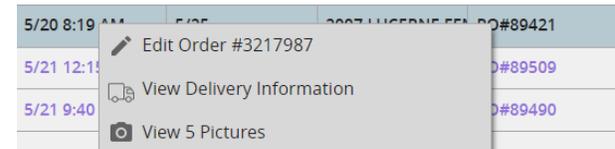
If the order was, or actively is, on its way to you via *EZ-Runner* you will see the current stop information. (Displayed on the left half)

If the order is on/or has been on an *EZ-Route* delivery truck you will see the active manifest for that truck from *EZ-Route.* (Displayed on the right half)
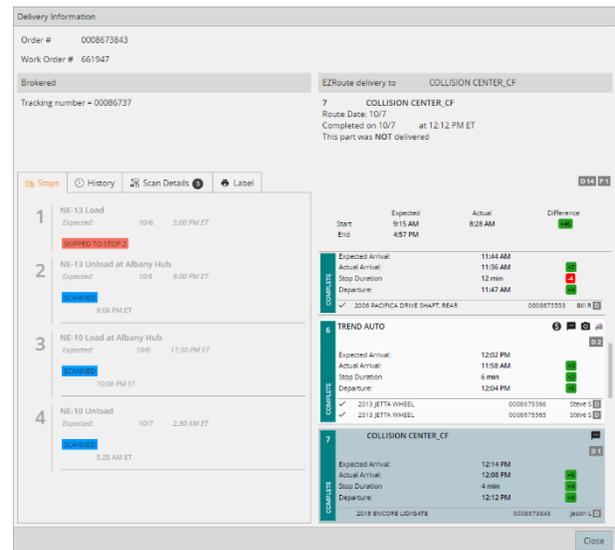
How do I Find My Order, and What is happening with it Right Now?

As a salesperson you may frequently field calls asking about the status of an order. This section will explain the steps you should take to locate the order and how to determine where it is or what is happening with it.

Where should I look for my orders?

You will be primarily working out of your **My Sales/All Sales** filters when using *EZ-QC*. When a customer calls and asks where their part is you can start by locating the order in these filters by using the **"Type here to filter…"** bar.
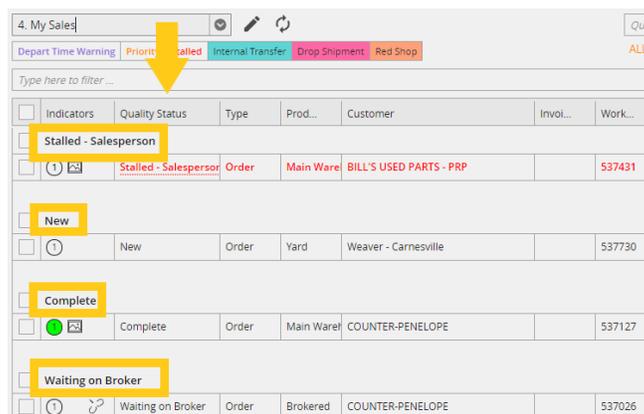

This filter allows you to use any visible data in the columns to find the order. That can include Customer Name, Part Type, Purchase Order Number (PO#), Work Order Number (WO#) or any other data that may be visible.

If your order doesn't come up while using the **"Type here to filter…"** bar you will then want to move to the **Quick Search**. This filter specifically is searching for an identifying number on the order, specifically, a WO#, PO#, or EZ Order number. In the event this order is from the past you can also search for a delivery ticket or invoice number by selecting that search type below the **Quick Search** and entering that number.

Tip If your order doesn't show up within the My Sales/All Sales filter while using the "Type here to filter…" bar, it has most likely been finalized. Finalized orders would usually indicate the part has been fully processed. You will want to quick search the order and confirm it has been processed (See next section to understand how to confirm the status of the order)

How do I know where my part is in process?

In *EZ-QC* the main key to understanding what is going on with your order is the **Quality Status**. Within many Sales views we group orders by the Quality Status, this can also be found in the Quality Status Column. Quality Status's change automatically as an order progresses through the *EZ-QC* process.

Quality Status Progressions

*In the case where an **in-stock part** goes from a part puller to a QC department the **Quality Status** will follow this progression:*

New -> **Working** -> **Waiting** -> **Working** ->**Complete**

New – The part is at your facility and ready to be worked on.

Working – A Part Puller is actively answering questions about the part at that moment.

Waiting – The part is waiting for further activity or awaiting a Final QC check.

Working – The part is actively being QC'd.

Complete – All of the part specific questions have been answered and the orders is fully processed.

*In the case where a **part is brokered** into your facility the **Quality Status** will follow this progression:*

Waiting on Broker -> **In Transit from Broker** -> **New** -> **Working** -> **Complete**

Waiting on Broker – This is a brokered (P.O.) part or internal transfer that has not yet been received by your facility.

In Transit from Broker – This is a brokered (P.O.) part or internal transfer that is in route to your facility but has not yet been received.

*If at any point an **order is Stalled** for additional approval the **Quality Status** will reflect "Stalled" followed by the role that the order is stalled for. Salespeople specifically will be responsible to open and respond to "**Stalled – Salesperson**". Depending upon your response the quality status adjusts as follows:*

Approve: The part will go to **Paused** and return to the device of the part puller who originally stalled the order so they can continue processing the part.

Stalled ->**Approved**->**Paused**->**Working**

Deny: The part will go to **Stopped** and move to your site's resolutions page. The order does not return to the part pullers tablet, any necessary adjustments to the order (i.e., Cancelling the order in your yard management system (YMS). Alternating the part with EZ or in your YMS. Brokering the part in)

Stalled->**Denied**->**Stopped**

Request Customer Approval: This forwards the approval so your customer can make the call. This will only work if the customer is linked via the EZ-Partner app or another EZ-QC yard. The status will change to "**Stalled – Customer**" until a response comes through.

Stalled ->**Request Customer Approval**-> **Paused or Stopped** (depending on their response).