5.06 Create Order Confirmation

Create

If a customer's order has to be stored in the system (for example in partial order) an order confirmation can be created by using the function "Create" in the intro screen or through the last offer version. The information of the order confirmation (order value, order number, order date) will be transferred to the order tab of the project.

An order confirmation can be created either through the navigation bar above the form or through an offer when a (partially) project order has been accepted:

Offer TLC-09-10-15						
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Master data	Misc	📑 Include 🔹 🕨				
Offernumber	TLC-09-10-15	🔍 Workflow 🕨	05 - Cancel offer			
		Edit 🕨	🍪 05 - Finalise offer			
Project	3 Introduction Projectile	Printing 🕨	🙀 07 - Delete offer			
Amount	8.500,00 EUR	🔯 ExtendValidity	08 - New offer out of cancellation			
Value added tax	VAT-GB-15		🍪 09 - New invoice out of offer			
Offer total			🎲 10 - Remove link to original offer			
	9.775,00 EUR		🕸 13 - New Confirmation			
OfferCreator	Conner Jane		V			
Offer date	16.10.2009	30.10.2009 📑 🗸]			

When creating an order confirmation out of the offer, all offer positions will be transferred.

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Master data Misc					
Confirmation number	2009-0003 ConfirmationStatus No Confirmation				
Project	 ✓ 3 Introduction Projectile ✓ 別へ聞×し 				
GroupingOption	No grouping v				
Amount	8.500,00 EUR				
Value added tax	VAT-GB-15 🔽 包Q图X				
ConfirmationTotal	9.775,00 EUR				
Employee	Conner Jane < 원이라)×				
ConfirmationDate	16.10.2009				
Purchase number					
Order date					
ConfirmationLines					
× PP 2D 1-3/3					
⊖ Posi ⊕ 1 □ 3-1	Ition				
⊕ 2 □ 3-2	Budget 3-2 External Consultant 1:00 h 0,125 Pd 4.500,00 3.400,00				
⊕ 3 □ 3-3	Budget 3.1-1 Travel costs 1:00 h 0,125 Pd 2.000,00 2.000,00				

After entering the order number and the order date, the order confirmation should be saved.

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Ma Save the document			
Confirmation number	2009-0003 ConfirmationStatus No Confirmation		
Project	▼ 3 Introduction Projectile ▼ ⊕@®×D		
GroupingOption	No grouping		
Amount	8.500,00 EUR		
Value added tax	VAT-GB-15 ▼ ÐQੴX		
ConfirmationTotal	9.775,00 EUR		
Employee	Conner Jane 🗸 知Q图X		
ConfirmationDate	16.10.2009		
Purchase number	A0K2305007201000		
Order date	16.10.2009		
ConfirmationLines			

If the complete order has not been commissioned, changes can be stored in the order confirmation. In the example two positions are marked and...

√™ ฿฿฿฿฿1-3/3 ๙๔₽ฅ♥						
	\ominus Position	⊖ Description	\ominus Hours	\ominus Amount external	\ominus Amount internal	
A Kemove	3-1	Job 4-1 Installation/Configuration	8:00 h 1 Pd	2.000,00	2.000,00	
₽ 2	3-2	Budget 3-2 External Consultant	1:00 h 0,125 Pd	4.500,00	3.400,00	
€)3 [3-3	Budget 3.1-1 Travel costs	1:00 h 0,125 Pd	2.000,00	2.000,00	

...after a security query the positions are deleted.

X Delete documents				
Delete documents Archive Standard				
Do you really want to delete?				
Documents	@ 🕶 🛛 🔄 page 🚺 of 1 🗼 🕅 🧶		1-2/2	
	Туре	Description	State	
	ConfirmationLine	3-1 Job 4-1, Installation/Configuration		
	2 ConfirmationLine	3-3 Budget 3.1-1 Travel costs		
	•		•	
Dependent documents	🧼 No entries 🔻			
Denied documents	No entries 💌			
BrokenLink Warning	No entries 🔻			
BrokenLink Error	No entries 🔻			
Do you really want to delete?	₹ 0 ×			

The modification of the positions changes the order value.

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Master data Mis	Master data Misc				
Confirmation number	2009-0003	ConfirmationStatus	No Confirmation		
Project	▼ 3 Introduction Projectile ▼ ⊕ < ♥ × ▷				
GroupingOption	No grouping				
Amount	8.500,00 EUR				
Value added tax	VAT-GB-15 ▼ €Q®X				
ConfirmationTotal	9.775,00 EUR				

Printing

By using the action 08 - Print contract note...

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Master data Misc		🎲 01 - Include jobs			
Confirmation number	2009-0003	🔯 02 - Include budget items			
	2007 0000	🎲 03 - Include external items			
Project	✓ 3 Introduction Projectile	🎲 04 - Finalise contract note			
GroupingOption		🎲 05 - Cancel contract note			
CroapingOption	No grouping	🎲 06 - Delete contract note			
Amount	8.500.00 EUR	🎲 07 - Remove link to original			
	2010	08 - Print contract note			
Value added tax	VAT-GB-15 ▼ 🔊 🤉 🖉 🗙	🎲 09 - Print contract note (grouping dialog)			
ConfirmationTotal	0.775.00 500	🖳 DesignTemplate			
	9.775,00 EUR				
Employee	Conner Jane 🗸 🕀 🖓 🕅 🗙	NewInvoiceFromConfirmationHeader			

...the order confirmation can be printed. The system generates an rtf-file, which can be opened or saved in the following dialogue.

Fil	eset		
	load		
#Open Save	File	Size	Last modified
1 🚯 🖬	Confirmation.rtf	31,22 kB (31.965)	19.10.2009 13:15:51

The "open" option opens the generated order confirmation in a configured browser or in a wordprocessing program.

		C	onfirmationTemplate1.rtf - Op	penOffice.org	g Writer		
<u>D</u> atei	<u>D</u> atei <u>B</u> earbeiten <u>A</u> nsicht <u>E</u> infügen <u>F</u> ormat <u>T</u> abelle E <u>x</u> tras Fen <u>s</u> ter <u>H</u> ilfe						
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	Standard		▼ Times New Roman ▼ 1	2 🗸 🔊			1=
L							
··6···5···4···3···2···1···	L 21X12345678910111213141516171 Information Desire Software GmbH · An der Brunnenstube 25 · D · 55120 Mainz TLC Telecommunications Corporation Mr George Williams 101 Kensington High Street W8 4 London GRDER CONFIRMATION: TLC-09-10-15						
		Project:	Introduction Projectile				
		Two pag	es are enclosed in this order confirmation	1.			
œ		We offer	you the following items:				
- 0		0.000					
-10							
11 10		Pos.	Description	Amount	Price	Tota	ī
2 - 11 - 10		Pos. 01	Description Job 4-1	Amount 8,00	Price 250,00 €	Tota 2.000,00 €	
121110		Pos. 01 02	Description Job 4-1 Installation/Configuration Budget 3-2 External Consultant	Amount 8,00 1,00	Price 250,00 € 4.500,00 €	Tota 2.000,00 € 4.500,00 €	- -
13 - 12 - 11 - 10		Pos. 01 02 03	Description Job 4-1 Installation/Configuration Budget 3-2 External Consultant Budget 3.1-1 Travel costs	Amount 8,00 1,00 1,00	Price 250,00 € 4.500,00 € 2.000,00 €	Tota 2.000,00 € 4.500,00 € 2.000,00 €	-
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··14 ··13 ··12 ··11 ··10		Pos. 01 02 03	Description Job 4-1 Installation/Configuration Budget 3-2 External Consultant Budget 3.1-1 Travel costs	Amount 8,00 1,00 1,00	Price 250,00 € 4.500,00 € 2.000,00 €	Tota 2.000,00 € 4.500,00 € 2.000,00 €	
15 - 14 - 13 - 12 - 11 - 10		Pos. 01 02 03	Description Job 4-1 Installation/Configuration Budget 3-2 External Consultant Budget 3.1-1 Travel costs	Amount 8,00 1,00 1,00 Subtotal Value-Adde	Price 250,00 € 4.500,00 € 2.000,00 €	Tota 2.000,00 € 4.500,00 € 2.000,00 € 8.500,00 € 1.275,00 €	
16 · ·15 · ·14 · ·13 · ·12 · ·11 · ·10		Pos. 01 02 03	Description Job 4-1 Installation/Configuration Budget 3-2 External Consultant Budget 3.1-1 Travel costs	Amount 8,00 1,00 1,00 Subtotal Value-Adde 15 Total	Price 250,00 € 4.500,00 € 2.000,00 € ed Tax: %	Tota 2.000,00 € 4.500,00 € 2.000,00 € 8.500,00 € 1.275,00 € 9.775,00 €	
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Include

When transferring the order confirmation...

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Project	✓ 3 Introduction Projectile	🕸 04 - Finalise contract note			
GroupingOption		🎲 05 - Cancel contract note			
	No grouping	🎲 06 - Delete contract note			
Amount	8.500,00 EUR	🎲 07 - Remove link to original			
Value added toy		08 - Print contract note			
value added tax	VAT-GB-15 ▼ ⊕ � � ≿	09 - Print contract note (grouping dialog)			
ConfirmationTotal	9.775.00 EUR	LesignTemplate			
Employee	Conner Jane	NewInvoiceFromConfirmationHeader			

... the order value, the order number and the order date...

Project 3 Introduction Projectile						
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Master data Invo	Ived persons Portfolio Status Budget Financial data Order data	Documentation	Misc			
Order value	18.120,00 EUR					
Purchase number	A0K2305007201000					
Order date	16.10.2009					

...will be added to the project in the Order Data tab.

After the order confirmation the project planning should be adapted if necessary (if for example the order comes in later than planned).

Project 3 Introduction Projectile				
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Master data Involved pe 01 - Project shaping and evaluating get Financial data	Order data Documentation Misc			

