

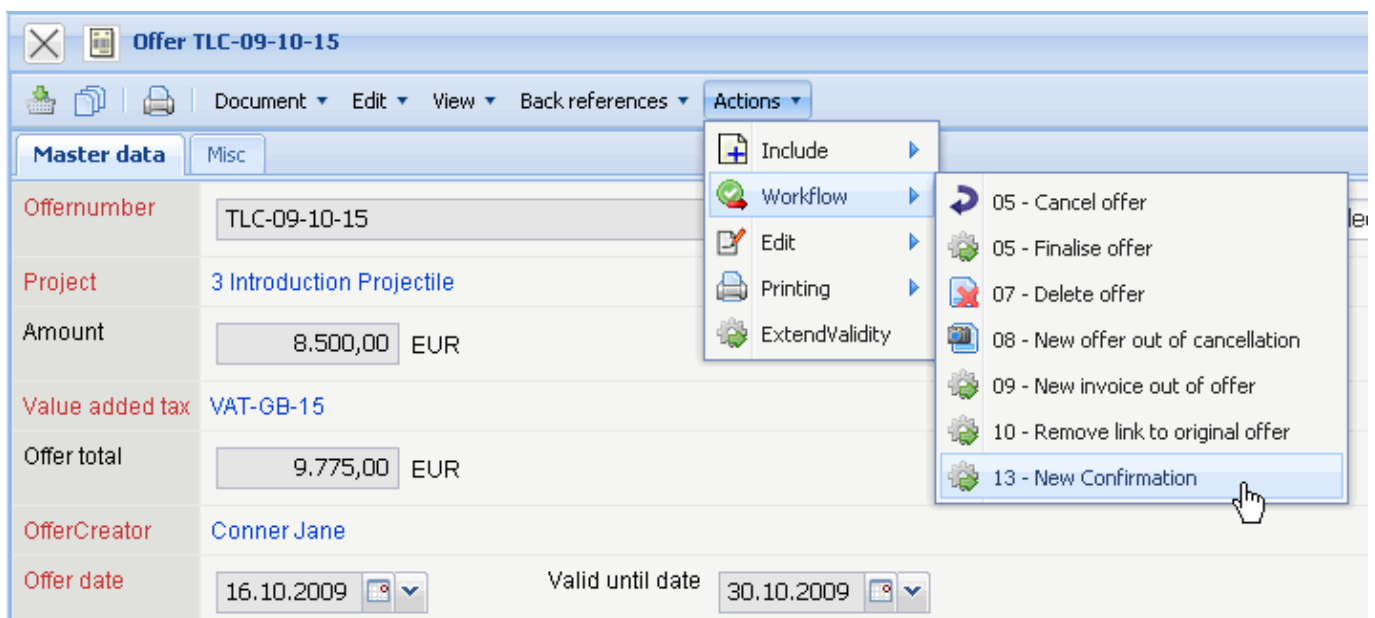
[previous](#) [Home](#) [next](#)

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:



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

ConfirmationHeader 2009-0003

Document | Edit | View | Back references | Actions

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

ConfirmationTotal: 9.775,00 EUR

Employee: Conner Jane

ConfirmationDate: 16.10.2009

Purchase number:

Order date:

ConfirmationLines

Position	Description	Hours	Amount external	Amount internal
3-1	Job 4-1 Installation/Configuration	8:00 h 1 Pd	2.000,00	2.000,00
3-2	Budget 3-2 External Consultant	1:00 h 0,125 Pd	4.500,00	3.400,00
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.

ConfirmationHeader 2009-0003

Document | Edit | View | Back references | Actions

Ma Save the document

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

ConfirmationTotal: 9.775,00 EUR

Employee: Conner Jane

ConfirmationDate: 16.10.2009

Purchase number: AOK2305007201000

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...

Position	Description	Hours	Amount external	Amount internal
3-1	Job 4-1 Installation/Configuration	8:00 h 1 Pd	2.000,00	2.000,00
3-2	Budget 3-2 External Consultant	1:00 h 0,125 Pd	4.500,00	3.400,00
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.

Delete documents

Delete documents
Archive: Standard

Do you really want to delete?

Type	Description	State
ConfirmationLine	3-1 Job 4-1, Installation/Configuration	
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?

The modification of the positions changes the order value.

ConfirmationHeader 2009-0003

Document | Edit | View | Back references | Actions

Master data | Misc

Confirmation number: 2009-0003 | ConfirmationStatus: No Confirmation

Project: 3 Introduction Projectile

GroupingOption: No grouping

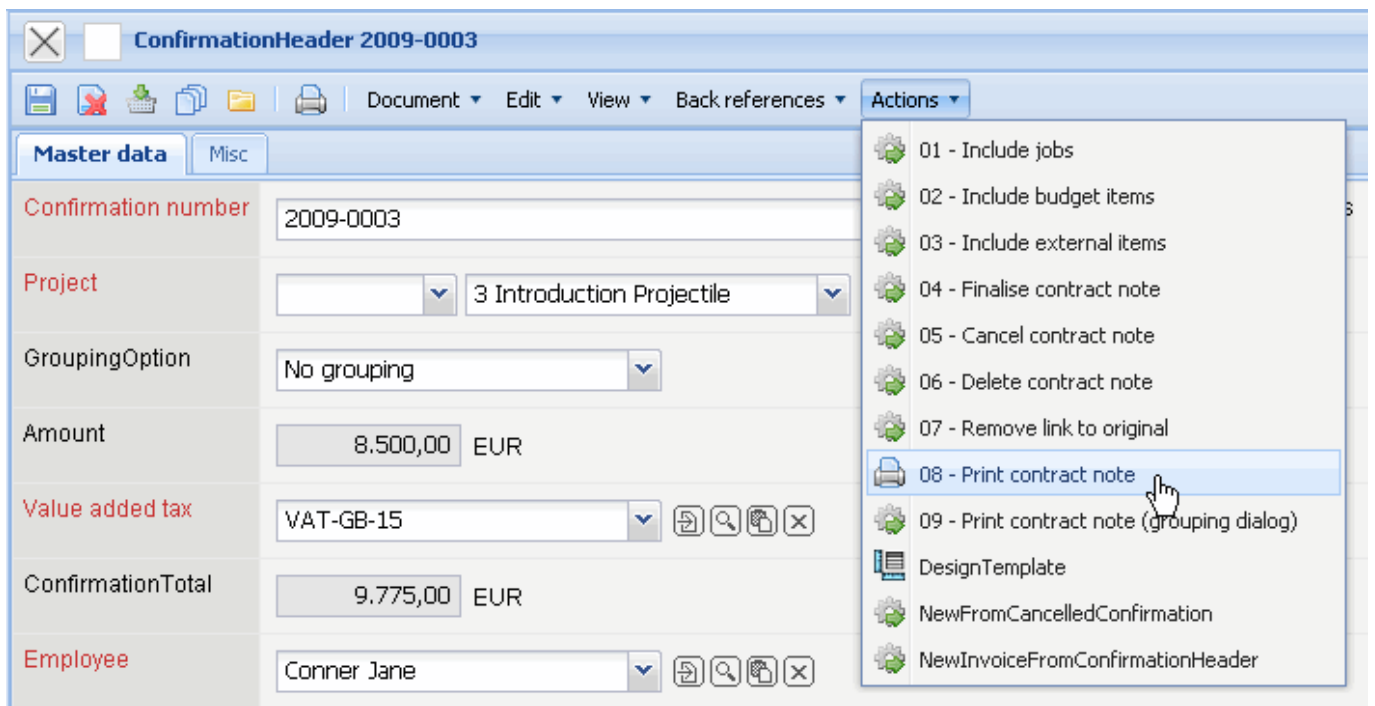
Amount: 3.500,00 EUR

Value added tax: VAT-GB-15

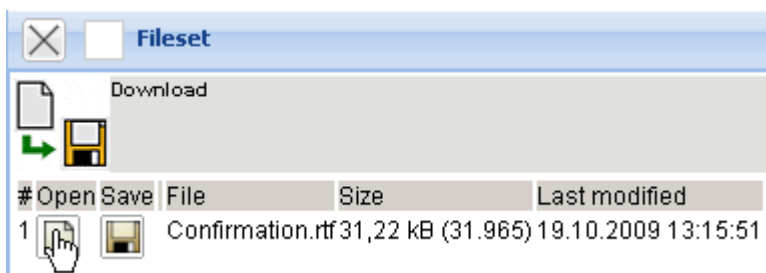
ConfirmationTotal: 9.775,00 EUR

Printing

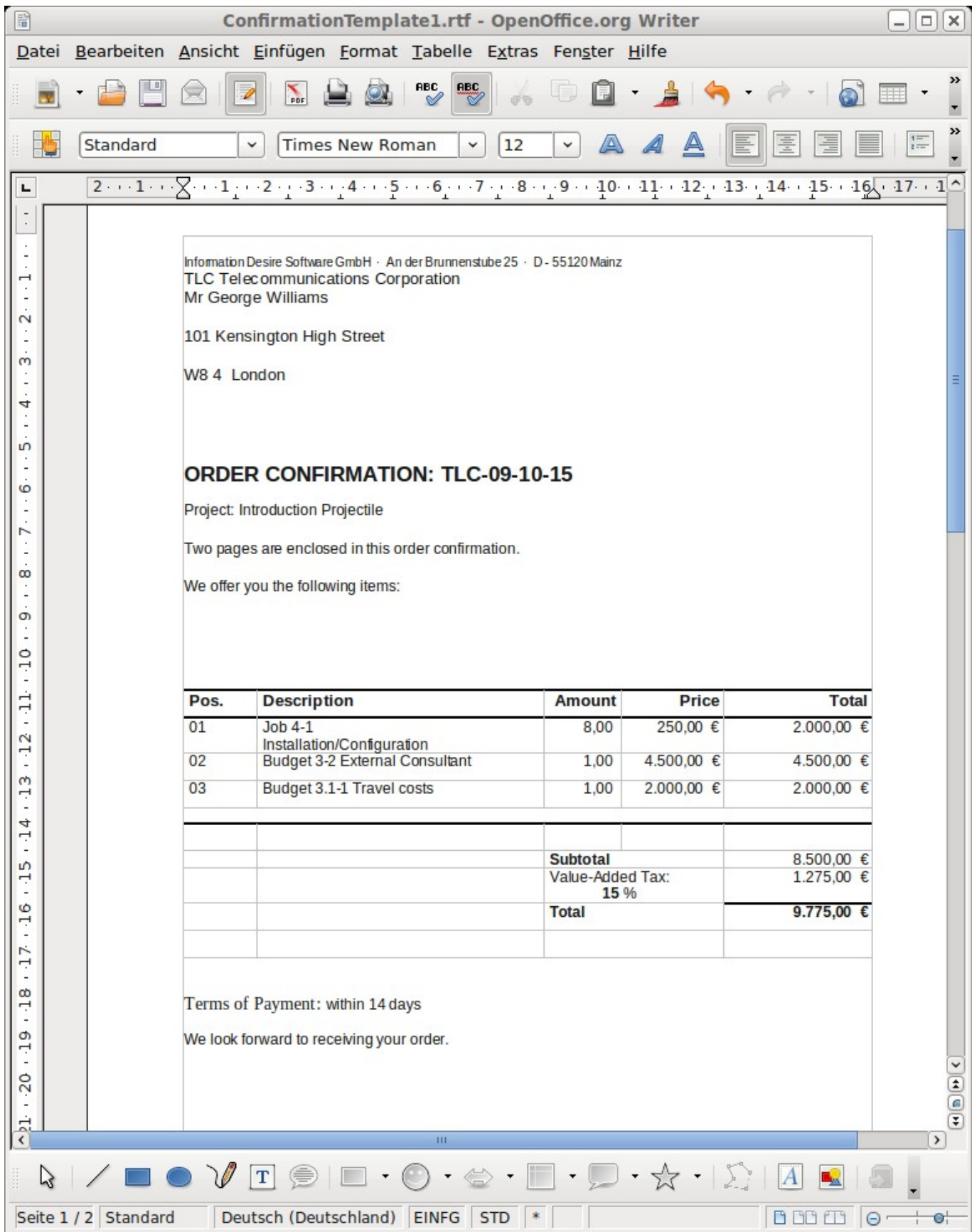
By using the action 08 - Print contract note...



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

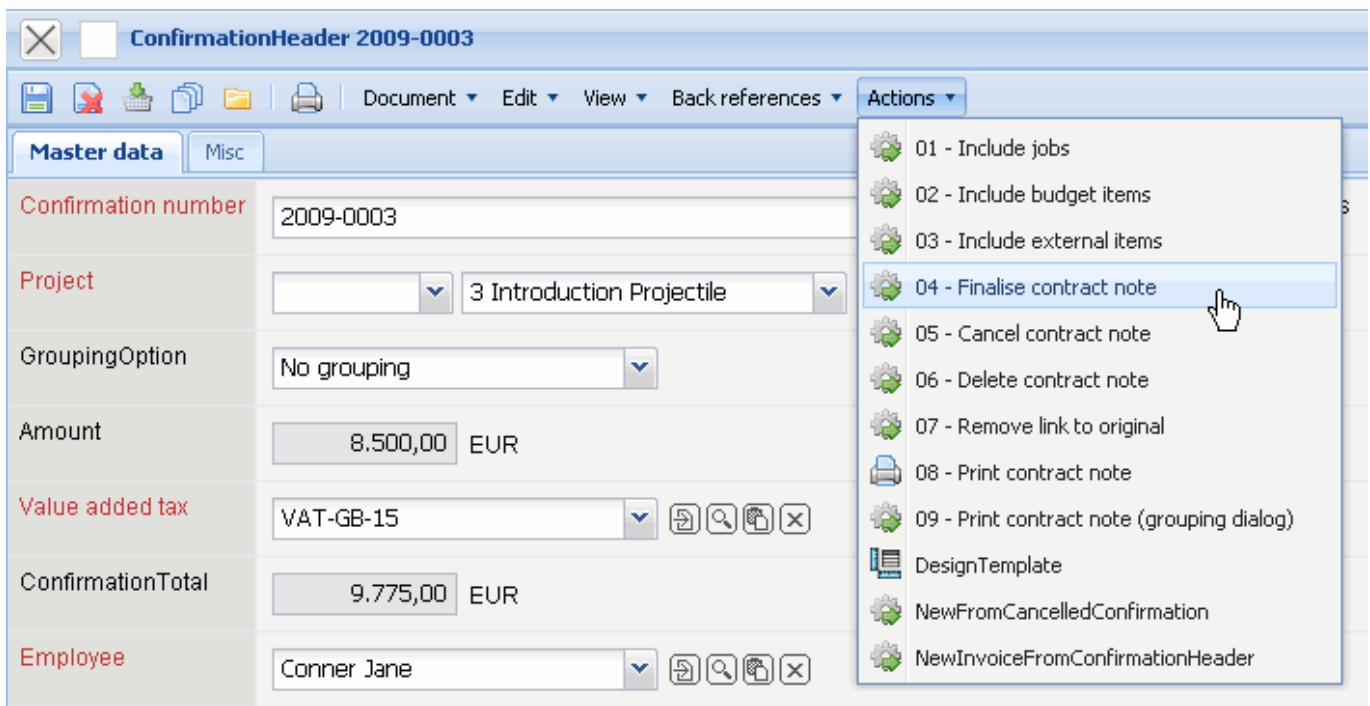


The "open" option opens the generated order confirmation in a configured browser or in a word-processing program.

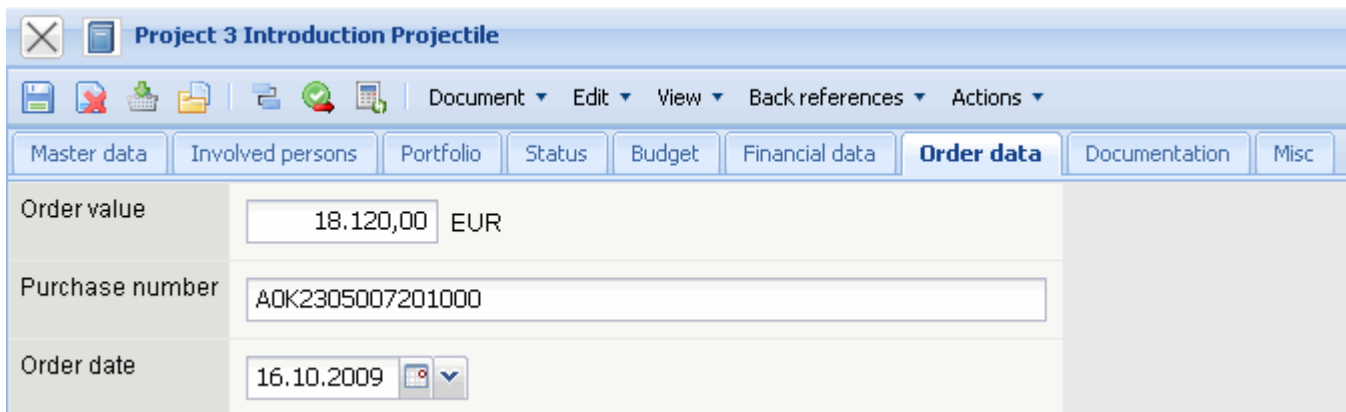


Include

When transferring the order confirmation...

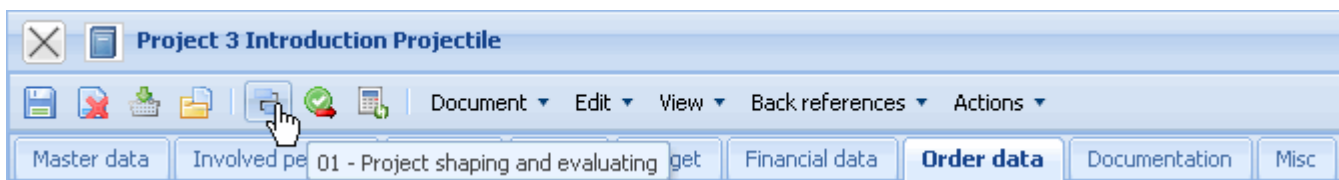


... the order value, the order number and the order date...



...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).



From: <https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link: https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_4:4.06_auftragsbestaetigung_erstellen&rev=1256656200

Last update: 2019/10/25 14:09

