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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:

The screenshot shows a software interface for managing offers. The main window is titled 'Offer TLC-09-10-15'. It features a navigation bar with icons for document, edit, view, back references, and actions. The 'Actions' menu is open, displaying a list of options: 'Include', 'Workflow', 'Edit', 'Printing', and 'ExtendValidity'. The 'Workflow' option is expanded, showing a sub-menu with the following items: '05 - Cancel offer', '05 - Finalise offer', '07 - Delete offer', '08 - New offer out of cancellation', '09 - New invoice out of offer', '10 - Remove link to original offer', and '13 - New Confirmation'. A mouse cursor is pointing at the '13 - New Confirmation' option. The main form area displays 'Master data' for the offer, including fields for Offernumber (TLC-09-10-15), Project (3 Introduction Projectile), Amount (8.500,00 EUR), Value added tax (VAT-GB-15), Offer total (9.775,00 EUR), OfferCreator (Conner Jane), and Offer date (16.10.2009). A 'Valid until date' field is also present, set to 30.10.2009.

Field	Value
Offernumber	TLC-09-10-15
Project	3 Introduction Projectile
Amount	8.500,00 EUR
Value added tax	VAT-GB-15
Offer total	9.775,00 EUR
OfferCreator	Conner Jane
Offer date	16.10.2009
Valid until date	30.10.2009

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

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...

1-3 / 3									
	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		
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.

Delete documents

Archive
Standard

Do you really want to delete?
☒
☐
☐

Documents

page 1 of 1

	Type	Description	State
1	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?
☒
☐
☐

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.

#	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 word-processing program.

ConfirmationTemplate1.rtf - OpenOffice.org Writer

Datei Bearbeiten Ansicht Einfügen Format Tabelle Extras Fenster Hilfe

Standard Times New Roman 12

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 TLC Telecommunications Corporation
 Mr George Williams

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 W8 4 London

ORDER CONFIRMATION: TLC-09-10-15

Project: Introduction Projectile

Two pages are enclosed in this order confirmation.

We offer you the following items:

Pos.	Description	Amount	Price	Total
01	Job 4-1	8,00	250,00 €	2.000,00 €
02	Installation/Configuration			
	Budget 3-2 External Consultant	1,00	4.500,00 €	4.500,00 €
03	Budget 3.1-1 Travel costs	1,00	2.000,00 €	2.000,00 €
Subtotal				8.500,00 €
Value-Added Tax: 15 %				1.275,00 €
Total				9.775,00 €

Terms of Payment: within 14 days

We look forward to receiving your order.

Seite 1 / 2 Standard Deutsch (Deutschland) EINFÜG STD

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).

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