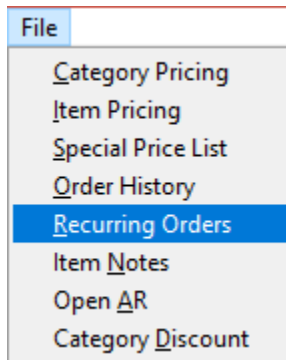


Recurring Orders for Customers

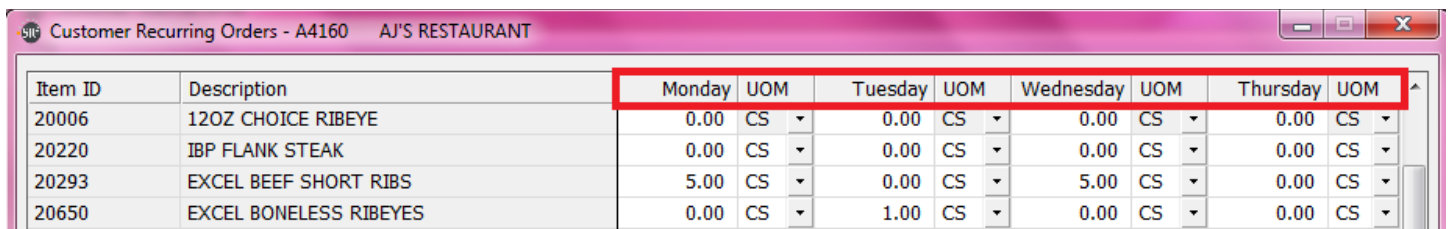
If you have customers that order the same amount of the same product on certain days, you can create Recurring Orders to automatically create the Sales Order.



The screen displays the Items in the **Customer Order History**.

The columns across the top of the screen will show from **Monday through Sunday**.

The UOM defaults to the last Unit of Measure the customer ordered. If the UOM is NOT grayed out, you can use the drop down to change it.

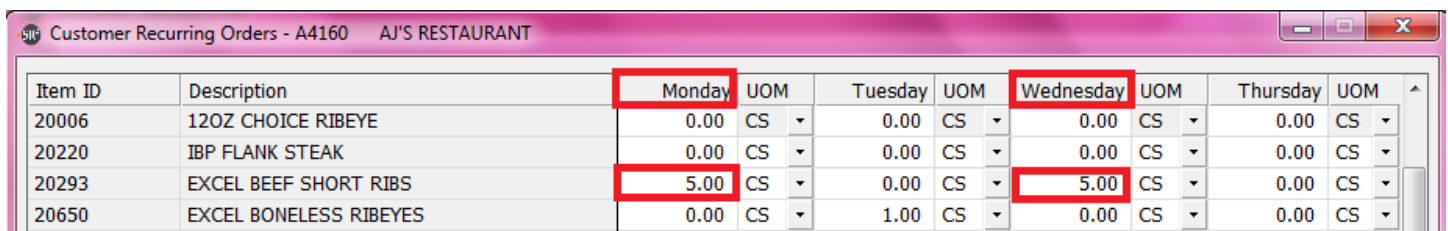


A screenshot of a software window titled 'Customer Recurring Orders - A4160 AJ'S RESTAURANT'. The window displays a table with columns for days of the week (Monday, Tuesday, Wednesday, Thursday) and UOM. The table has 4 rows of data. The first row is highlighted with a red border.

Item ID	Description	Monday	UOM	Tuesday	UOM	Wednesday	UOM	Thursday	UOM
20006	12OZ CHOICE RIBEYE	0.00	CS	0.00	CS	0.00	CS	0.00	CS
20220	IBP FLANK STEAK	0.00	CS	0.00	CS	0.00	CS	0.00	CS
20293	EXCEL BEEF SHORT RIBS	5.00	CS	0.00	CS	5.00	CS	0.00	CS
20650	EXCEL BONELESS RIBEYES	0.00	CS	1.00	CS	0.00	CS	0.00	CS

Use the **Slide Bar** at the bottom of the screen to show the rest of the columns.

If the customer always orders 5 cases of Excel Beef Short Ribs every Monday and Wednesday, you would enter it in this screen. Click on the **Accept Button** at the bottom of the screen to save your entry.



A screenshot of the same software window as above, but with the 'Monday' and 'Wednesday' columns highlighted in red. The 'Monday' column for the 'EXCEL BEEF SHORT RIBS' row is highlighted with a red box, showing the value '5.00'. The 'Wednesday' column for the same row is also highlighted with a red box, showing the value '5.00'.

Item ID	Description	Monday	UOM	Tuesday	UOM	Wednesday	UOM	Thursday	UOM
20006	12OZ CHOICE RIBEYE	0.00	CS	0.00	CS	0.00	CS	0.00	CS
20220	IBP FLANK STEAK	0.00	CS	0.00	CS	0.00	CS	0.00	CS
20293	EXCEL BEEF SHORT RIBS	5.00	CS	0.00	CS	5.00	CS	0.00	CS
20650	EXCEL BONELESS RIBEYES	0.00	CS	1.00	CS	0.00	CS	0.00	CS

The system will automatically generate the recurring orders at midnight and create a sales order for the customer based on the recurring order. For example, on Tuesday 8/14/12, I entered in a recurring order for AJ's for every Monday and Wednesday for 5 Cases of Excel Beef Short Ribs. When I came into the office on Wednesday 8/15/12, the system generated an order for AJ's:

Sales Order Entry - 01-SR2SOFTWARE, INC.

Print View

Order # 5027 **ENTERED** Ship Date 08/15/12 Total 1,355.75

Customer AJ'S RESTAURANT Order Lines 2 GP % 19.95

Redem Value 0.00 Fuel Surcharge

Buttons: Short, Assign Lots, Delete, Cancel, Accept, Pick, Print Invoice, Email, Invoice

Header | **Lines** | Lines - Full Screen | Guide - Full Screen

Item	Description	Order	UOM	Price	Ship	Bill	Extension	GP %	CR	Line
X 20293	EXCEL BEEF SHORT RIBS	5.00	CS	3.03	5.00	300.00	909.00	23.10		0001
X 20800	SMITH BONELESS RIBEYE	1.00	CS	5.85	1.00	75.00	438.75	11.97		0002

NOTE: You cannot add a recurring order on a Wednesday to generate on Wednesday. The system generates the orders at midnight for the following day. If you enter in a recurring order for a Wednesday on a Wednesday, the system will not generate the recurring order until the following Wednesday.

If the customer orders a recurring item that they have not ordered in the past or the item is not in their Order History, you can simply add it.

Customer Maintenance

File

- Category Pricing
- Item Pricing
- Special Price List
- Order History**
- Recurring Orders
- Item Notes
- Open AR
- Category Discount

Click in **Insert Button**.

Item ID

Insert Delete Accept Cancel

Enter in the **Item ID**, click on **Accept** Button to save.

Item ID 10006 ROME 3-OZ LOBSTER CAKES

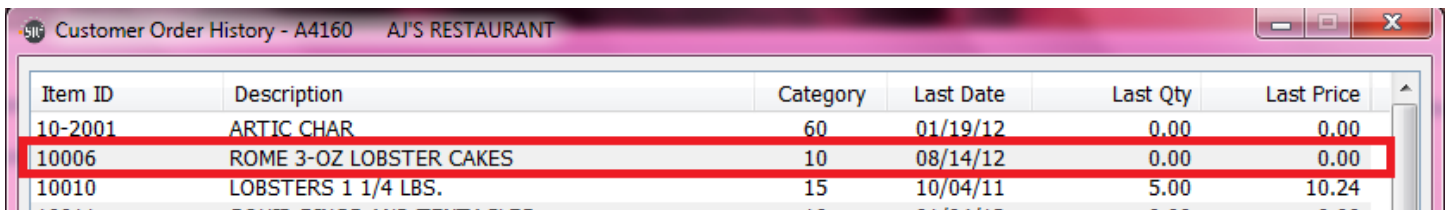
Insert Delete **Accept** Cancel

When you look at the Order History screen after you added the item, you will notice:

Late Date will be today's date

Last Qty will be zero

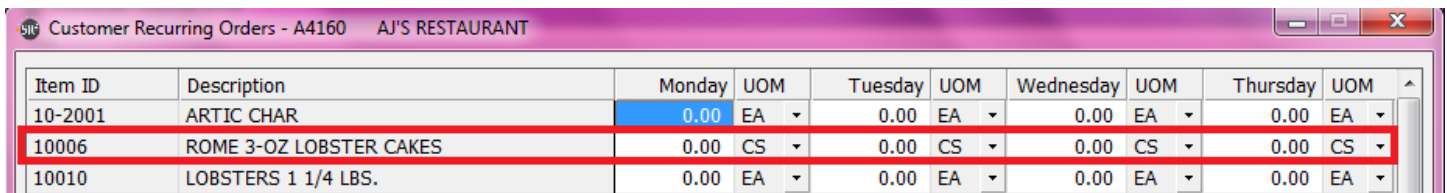
Last Price will be zero



Item ID	Description	Category	Last Date	Last Qty	Last Price
10-2001	ARTIC CHAR	60	01/19/12	0.00	0.00
10006	ROME 3-OZ LOBSTER CAKES	10	08/14/12	0.00	0.00
10010	LOBSTERS 1 1/4 LBS.	15	10/04/11	5.00	10.24

When you go back into **Recurring Orders**, the new added item in Order History will display.

You can add the item to the day of the week for the quantity the customer would like to order.



Item ID	Description	Monday	UOM	Tuesday	UOM	Wednesday	UOM	Thursday	UOM
10-2001	ARTIC CHAR	0.00	EA	0.00	EA	0.00	EA	0.00	EA
10006	ROME 3-OZ LOBSTER CAKES	0.00	CS	0.00	CS	0.00	CS	0.00	CS
10010	LOBSTERS 1 1/4 LBS.	0.00	EA	0.00	EA	0.00	EA	0.00	EA