Checking the Active List
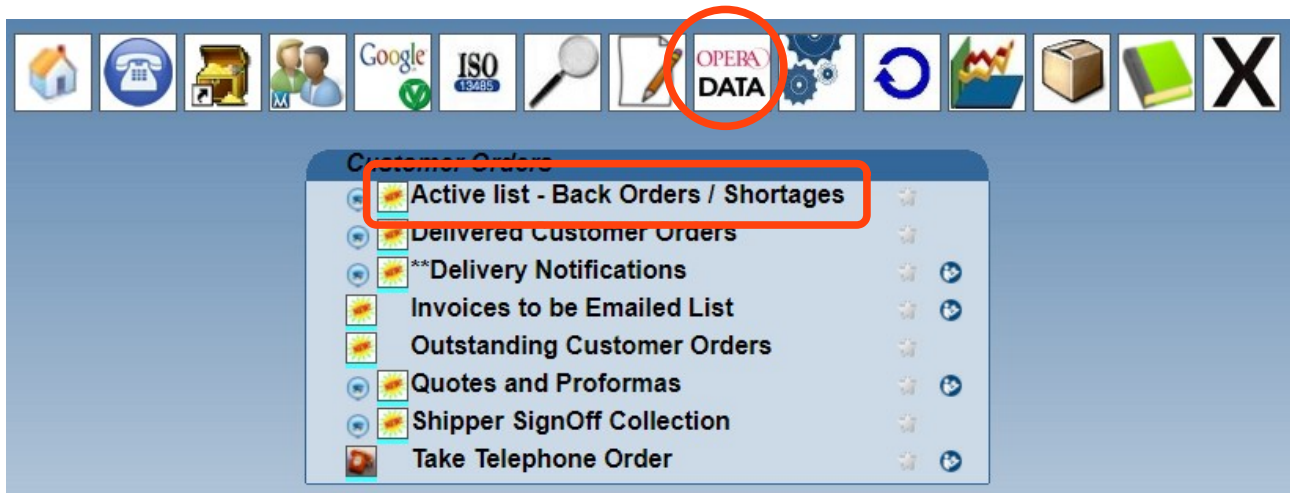
VM3COP20.20

On Intrastats, click the "Opera Data" tab and click on "Active List – Back Orders / Shortages".

Each line of the active list should be checked DAILY by both the office and Goods Out, an item that has been checked will have a tick in the last column on the right.

Checking Memos

To check memos you need to hover over the M icon to the left of the order line. This previews all notes shown on the order processing screen and is the quickest way to view any notes regarding the status and progress of the order.

You are checking the order is **not stuck in limbo**, the customer is **aware of any delays**, and **we are aware** of the order.

Once you are happy that nothing needs doing with the customer order you can return to the active screen and tick the box as checked.

Check that orders which require partial shipment or can be shipped early have been done. If not, liase with Goods out and then add notes.

Any orders on a priority 8, check that they have been chased and that notes have been added by the person who processed the order. If that member of staff is not available, follow up if required.

If the lead time quoted to the customer has passed, the customer should be contacted again to explain why and be advised of the new expected lead time. This contact must be noted on the order.

If an order is blue and has no notes, speak with the person who added the order and ask them to make notes and add to active list.

Adding Notes

Click the magnifying glass next to the order number to be checked.

You will be presented with an order review screen, click "Original Details" and you will be shown the original order processing screen.

Should you wish to filter the active list to just show orders outstanding for a single customer, click the filter icon next to the customers name.

Once you have clicked the "Original Details" button you will be shown the order processing screen.

Current notes regarding that order are included in the NOTES section.

NOTES	
Order Notes (Does not print on Paperwork)	**02 Dec 2021 Zoey Teal** Quotation now split into two as per email attached. 22 on this quote and 28 on QVM134071 **13 Dec 2021 Zoey Teal** For the Neonatal as per SH. Todays date as this needs to be live as these are overdue **13 Dec 2021 Zoey Teal** Quotation now split into two as per email attached. 28 on this quote and 22 on QVM134071 Add Notes: Highlight ⦿ None | ◯ Bold | ◯ Bold / Red

Icons Explained

M Back Order - Supplier ▾ Update 07 Dec 2021 Catherine Spence **M** ✎241395 ✔●☗	CVM133714 🔍📇📄	✋ 📦🔻	Jikco Limited	📄20211108003VIAMED	🔍0110361	100	12	**88**	0	17 Jan 2022	2 ✔

M **Memo Preview**

✎ **Create Issue**, if there is a number next to this icon there is already an issue outstanding. You can click this number and it will open the related issue for you.

✔ **Checked** – This shows the checking status and any notes which were added.

● **Override Order** – This turns the order orange so it can not be picked. This is only done by the warehouse.

☗ **Can be shipped early** or **Can be part shipped**

👀 **Order Unchecked -** Order can not be picked until checked

✋ **Can be picked –** This will also show if stock is not available.