

# **USER MANUAL CREATE ORDERS**

Create Orders

# Orders

Orders Reset Filter Clear Back

Add Orders

**CUSTOMER LOOKUP**

Search (name, email, phone, code)  
Type 3 character for result

Sites  
Select site

Orders / Quotes  
Select available order

**ORDER DETAILS**

Unique ID: EBNZL4N1CZ2PHYT Date: 20 January 2024

Bin Size: Select bin size Waste Type: General Waste

Street Number: Unit / Lot (optional) Street Name

Postcode: Town / City Suburb (optional) State

Collection Date: 1 Day 2 Day 7 Day

Delivery Date: 20 Jan 2024 2 Feb 2024

Delivery Instructions: Choose template delivery instruction --  
Input delivery instructions

Find Bin Price Setup Mail Bin

**This is the “Orders” menu.  
In the menu there are  
several actions including :**

1. Customer Lookup
2. Order Details Form
3. Find Bin Price
4. Convert to Order
5. Choose payment, Save As Quote and Save as Draft

Convert to Order

Choose Payment

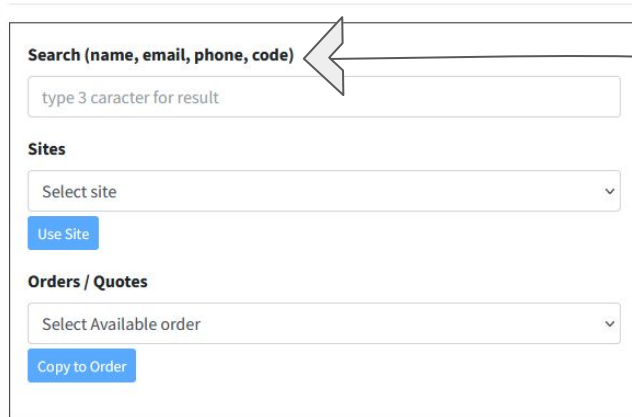
Save As Quote

Save As Draft

1

# Customer Lookup

## CUSTOMER LOOKUP



The form is titled "CUSTOMER LOOKUP" and contains three main sections:

- Search (name, email, phone, code)**: A text input field with the placeholder text "type 3 character for result". A large grey arrow points from the right towards this field.
- Sites**: A dropdown menu with the text "Select site" and a downward arrow. Below it is a blue button labeled "Use Site".
- Orders / Quotes**: A dropdown menu with the text "Select Available order" and a downward arrow. Below it is a blue button labeled "Copy to Order".

Use the "Customer Lookup" function to search for existing customers. This action allows you to quickly access information related to a particular customer, enhancing the customer service experience.

2

## Find Bin Price

[Find Bin Price](#)

\$190

best price found!

ADD DISCOUNT +

Extra Days

3

Extra Days Price

15

Bin Price

190

Discount

0

Fixed Price

190

CHOOSE EXTRA SERVICE

All

Product

Service

Search Item



Service

Bed Base

\$0



Service

Car Tyre

\$10



Service

Truck Tyre

\$25



Product

HaziBag - Asbestos

\$0



Service

Travel per KM

\$2.2

Service Name

Input service name

Type

Product

Quantity

Input Quantity

Price

Input price



After you fill in the order details then you need to click on "Find Bin Price". This action will assist in locating the pricing information for a specific bin and waste type. It streamlines the process of providing accurate pricing details.

3

## Convert to order

**CUSTOMER DETAILS**

<b>Customer Name</b>	<b>Billing Address</b>
<input type="text"/>	<input type="text"/>
	<input type="checkbox"/> Use delivery address as billing address
<b>Email Address</b>	<b>Work Phone</b>
<input type="text"/>	<input type="text"/>
<small>Site Contact ( <input type="checkbox"/> Use the billing Name and Phone number )</small>	
<b>Name</b>	<b>Phone</b>
<input type="text"/>	<input type="text"/>

1

2

after you fill in all the customers details form then you can click the “Convert to Order” button to going to the payment process.

## 3

# Choose Payment

Total Bin Size	\$215.00
Total Extra Days Fee	\$15.00
Total Extra Services	\$0.00
GST	\$20.91
Grand Total	\$230.00

[Choose Payment](#)[Save As Quote](#)[Save As Draft](#)

1

## Select Payment Method

x

2

**Stripe Payment**

For secure payment with Stripe

**Bank Transfer**

Pay with direct transfer to bank account

**Cash**

Pay with cash

[Pay later](#)

On this process you will see the summary of the order that you made for the customers. To do the continue to the payment process click on “Choose Payment” button then you can select the payment method.