

# **USER MANUAL CREATE ORDERS**

Create Orders

# Orders

Orders Cancel Order 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 Days 7 Days

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

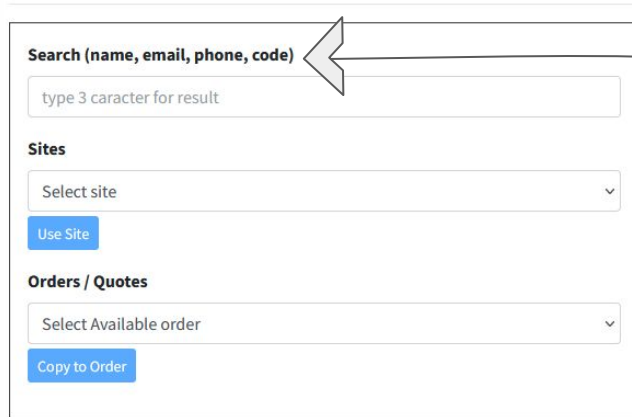
Save As Quote

Save As Draft

1

# Customer Lookup

## CUSTOMER LOOKUP

A screenshot of a web form titled 'CUSTOMER LOOKUP'. The form is enclosed in a light gray border. It contains three main sections: a search section at the top with a text input field and a 'Use Site' button; a 'Sites' section with a dropdown menu and a 'Use Site' button; and an 'Orders / Quotes' section with a dropdown menu and a 'Copy to Order' button. A large white arrow points from the text on the right towards the search input field.

Search (name, email, phone, code)

type 3 character for result

**Sites**

Select site

Use Site

**Orders / Quotes**

Select Available order

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

# Fill in Order Details Form

**ORDER DETAILS**

Unique ID: EBNZ-FOZGN6KQBM PO: Date: 12 September 2025

Category: Skip Bin Bin Size: Select bin size Waste Type: Green Waste

Address: [Redacted]

Street Number: Unit / Lot (optional): Street Name:

Postcode: Suburb: State: Tasmania

Delivery Date: 13 Sep 2025 Collection Date: Ad Hoc 3 Days 5 Days 7 Days 20 Sep 2025

Delivery Instructions: -- Choose Template Delivery Instruction --

Input delivery instructions

Find Bin Price

## 1. Bin Size & Waste Type

- Select the bin size.
- Select the waste type.
- Enter the address.

**Note:** The system uses Google Address Lookup. Once you type at least 5 characters, a list of suggested addresses will appear.

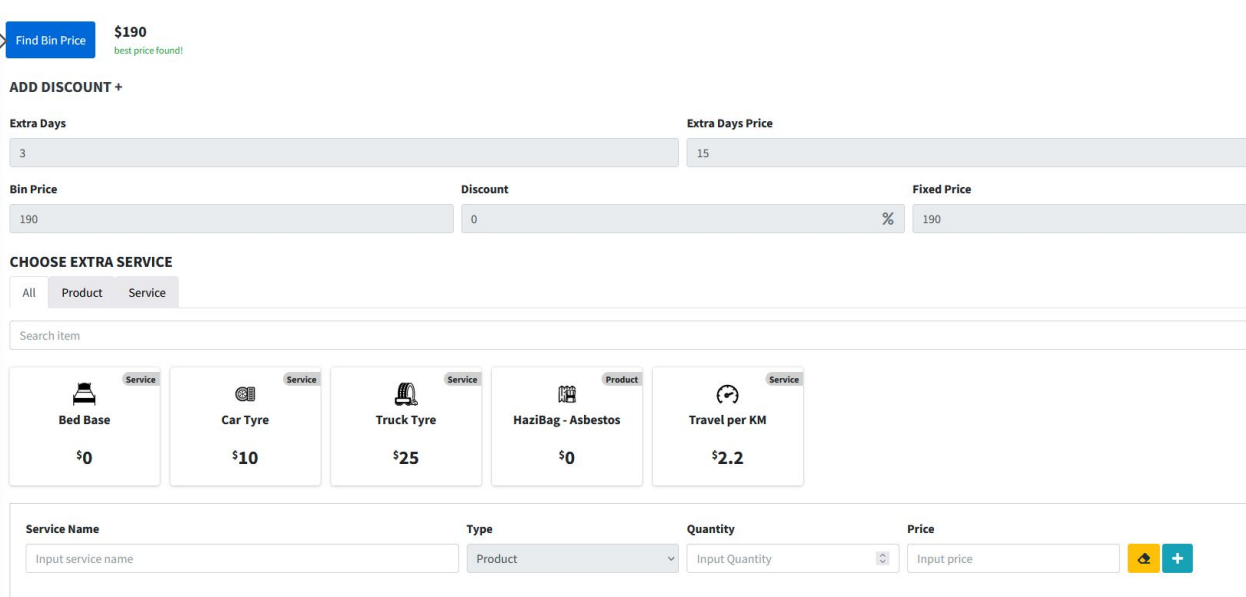
## 2. Delivery & Collection Dates

- Choose the delivery date.
- Choose the collection date.

**Tip:** If the collection date is not fixed, turn on the **Adhoc** button. This means the customer will call when they want the pickup.

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## Find Bin Price



**Find Bin Price** \$190  
best price found!

**ADD DISCOUNT +**






Extra Days	Extra Days Price
3	15

Bin Price	Discount	Fixed Price
190	0 %	190

**CHOOSE EXTRA SERVICE**

All Product Service

Search Item

 Bed Base \$0	 Car Tyre \$10	 Truck Tyre \$25	 HaziBag - Asbestos \$0	 Travel per KM \$2.2
--	---	---	--	---

Service Name	Type	Quantity	Price
<input type="text" value="Input service name"/>	<input type="text" value="Product"/>	<input type="text" value="Input Quantity"/>	<input type="text" value="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.

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## 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.

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## 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.