Placing an Order

Overview of the Order Sheet

This section will help you navigate around the order sheet and change settings to customise your view of the screen.

NOTE: If you don't have any products in your order sheet, you will be redirected to the browse market page to add products. Jump to the "browse market" section of this user guide now to understand this first.

Overview

The Order Sheet is laid out with your products in the centre table sorted by supplier. Filters down the left hand side make your page more manageable. The far right columns are your working columns where you place items into your basket and add comments/instructions.

Overview

Navigating and Customising the Order Sheet

You can customise your order sheet layout to suit yourself allowing you to place orders as simply as possible. The paragraphs below explain how to do this.

Ordering Columns

You can change the order of the columns from left to right by clicking and holding on one of the column headings and then dragging it to the new placement.

Column Widths

You can change any column's width by hovering over the line between the column headings and clicking and holding when the double arrow appears. Then drag the column wider or narrower.

Ordering the products with a column

You can change the order of the product items within a column by clicking once on column heading arrow. This will sort your products by that column heading eg if you want to sort your products alphabetically then click on "description", if you want to sort by price then click on "price". Note if you want to sort by two columns eg by supplier and then alphabetically just click on the columns in reverse order ie "description" and then "supplier".

Custom sequencing of your products

You can sequence your products in a user specific way eg if you wanted to sort your products in the way they appear in your stockroom. Just click on a row and drag and drop it where you want it.

Searching for products

You can search for any item by typing in the box in the description heading.

Filtering suppliers or specials

You can filter your products so as to have a more manageable selection on your page.

- Click on the "special offers only" box and only products that are on special will be displayed. Click again and all products appear

- You can choose to only show products from specific suppliers by clicking and unclicking both the "All/Clear Suppliers" and the individual suppliers names down the left. This will help if you want to order from one supplier at a time or if you want to clear suppliers away once you've ordered from them.

This is a useful tool for clearing up too many items appearing on your order sheet.

Moving/Tabbing between items

In the "Order Quantity" column by pressing the tab or enter button on your keyboard you can move from one box to the next below it in the order guide while quickly typing in the quantity of each product you wish to order for the day.

Viewing items on the next page

If you have a long list of items you can move to the ones further down the list in a number of ways:

- Collapse the supplier groups as described above in filtering fields. This will give you more room on the front page to see items further down the list

- Click on the page number at the bottom of the page if you scroll down to take you directly to the next page or a page where your items may be.

Ordering Items

This section describes how to select the items you wish to order.

Selecting your order sheet

Ensure your are in the "order sheet" tab and in your correct order sheet. In the column heading above filters you can use the drop down box to filter which order guide you would like to use. Ideally you will have a guide for your bar section and a guide for your kitchen section.

Set up the page view to suit yourself (see customising the order guide view in the previous section).

The order guide page

Entering item amounts

You are now ready to start ordering. All of the items you usually order will be laid out neatly on the page. They are grouped by each supplier and ordered in whichever way you feel best to make your ordering most efficient (sometimes it may be best to order everything alphabetically but you may also arrange items as they are in the stock room). It is time to start ordering items.

Selecting Product Items

To select a product item click on the box in the "order quantity" column alongside the item you wish to order. Type in the box the number of items you wish to order. Note, you don't need to submit these to get them to your basket. As you type the number they will be entered into your basket. Remember to pay close attention to the unit and packsize of each item. If the unit says "each" it is the number of items you are ordering, if it says "kg" it is the amount of kilograms you are ordering. If it says "pack" it is the number of packs you are ordering (the packsize column will tell you how many items per pack).

Note the price tells you the cost per what's in the unit field. Ie if the unit is KG the price will be per kilogram. As you enter items the expected total price will appear to the right.

A word about item sizes. It can be confusing if you are ordering an item that isn't exactly the amount in the pack size. For example, you may wish to order a 2kg pumpkin however the actual pumpkin may only be 1.9kgs. The supplier will be able to adjust for this in your order by correcting the exact size of the pumpkin he will deliver and the price will adjust for this.

Moving down the product sheet selecting multiple items

You can select as many items as you wish. You can move down the order sheet by either:

- Tabbing down the "order quantity" column from one item to the next putting in the quantity of each item you wish to order. When you get to the end of the page you can click on the page number at the bottom of the order guide to move to the next page. Or,

- Collapsing each Supplier as you go down. Enter the amounts of each item you wish to order per supplier and then click/unclick on the supplier names down the left. Don't worry if your items you are ordering disappear off the order sheet, they are already in your basket.

Finding Products not in the list

If you cannot find an item you are looking for you can either:

- Add it as a once off item. You can do this in the browse market sheet. See next section,

- Add it as an item into your order guide so that it will be there for next time. (See section on adding items to order guide in the browse market sheet),

- Add a custom item. See next section on customising orders

Previewing your order/basket

Once you have selected your items you can preview your shopping basket by clicking on "basket" at the top of the page. You can always return to the order sheet from the basket if you want to select more products. You'll see that the products in the basket are selected in the order sheet.

Customising your Orders

This section describes how to add comments to products that are confusing to order
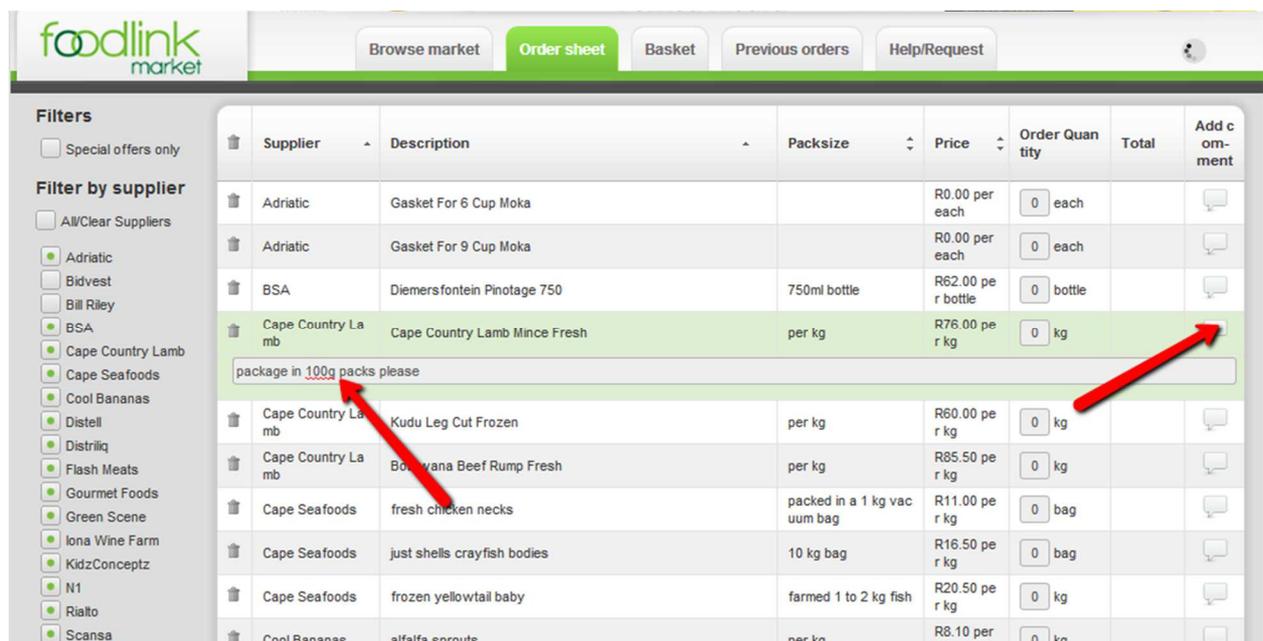
Adding Comments to items you wish to order

You can add comments or instructions about each product you wish to order that may not necessarily be in the product description. Eg if a product says beef fillet by the kilogram you may wish to instruct the supplier to cut the beef into 250g steaks.

To do this click on the comment bubble to the right of the product. Type in the instruction and press enter. The bubble will now turn green showing that you have a comment in there. To delete the instruction just click on the bubble and delete the comment and press enter again.

Note: once a comment is entered for a product it will stay there even once you have submitted your basket. The comment is related to that product so you don't have to keep typing the instruction in every day you order the same item.

Adding comments or instructions for each item

Entering in custom products

You may have a product you wish to order that you cannot find anywhere in the market site for some reason. In this instance you can literally free type in an item for a supplier.

Scroll down to the bottom of the order sheet page and there you will see the "add own item" section. Click on the supplier and select the supplier you wish to order the item from. Then free type into the description box the details and in the quantity box the number you wish to order. You must then click on "add to basket" for it to go to your basket. You can type in as many items as you wish.

Note, we will most likely update the database if you use this facility as it really is a last resort function.

Previewing your Order/Basket

Once you have selected your items you can preview your shopping basket by clicking on "Basket" at the top of the page. You can always return to the order sheet from the preview page if you want to select more products.

Previewing and Submitting your Basket

This section describes how to view and correct the products in your order as well as submitting the order for the day.

Overview of the Basket screen

Once you have finished typing in the quantities of each product you wish to order for the day, select the "Basket" tab to review and submit your order. In this screen you are going to check your order to ensure the quantity and amounts are all correct and edit the order.

First check that the order is indeed from you or the person supposed to be submitting the order in the top left hand corner.

The Basket Screen

In this screen you can:

- Correct the quantity of each item. By clicking on the "order amount" box you can edit the quantity of that particular product.

- Delete items by clicking on the delete dustbin next to each item. (Note is will not delete this item from your order guide. It will only delete the item from today's order)

- Add or edit notes/comments (see below)

- Save the order by clicking back to the browse market or order sheet.

- Change the order number to a specific order number to match your systems.

Adding/Editing Notes/Comments

You can add/edit notes/instructions as free text that the supplier will see in the order. You can either:

- Add/edit item comments by clicking in the box under the comment column, next to the item and typing in free text. It is here that you can specify to the supplier any specific order requests for that item eg. please slice the ham.

- Add supplier instructions. It is here you add notes to tell the supplier about his entire delivery eg. please deliver before 15.00. This block is below the items next to the subtotal.

Submitting your order

Once you have previewed your order and all your items look correct you can select "submit order" at the top of the page. A confirmation box appears to which you click "OK" and your orders will be sent to the various suppliers.

Each supplier will receive an email with the specific order relevant to them and they can also view the specific order online.

You will be redirected to the previous orders screen where you will be able to track your orders and print them off.

To place another order click on "order guide" and start again.