

## Call Off Orders Overview

There are times when an order may not be completely delivered all at once. Call Off Orders help keep you organized and your orders shipped based on your customers' needs. This course examines the benefits of using Call Off Orders and walks through the process to accept, deliver, and mark them complete. Let's get started.

Imagine you are working with a contractor who is building multiple homes in a housing development. The contractor requires different materials as they progress on each home. By using call off orders, you can keep track of and send each of the materials as they are needed to the job site.

Call off orders can also be used to help a contractor keep organized on the job. For example, if they have ordered a large quantity of drywall for a project, you can break the order up into call off orders by floor. Now, the contractor can clearly see how much of each product belongs in each level of the house. In this way, you can fulfil the order by building section rather than as one entire order. Call off orders also have assigned dates so that you can see when the various materials are required.

Call off orders are commonly created from a quote. Locate the quote that you will accept for the call off order, and double click it. From the top toolbar, select Accept. In the Accept Quote window, click Accept to Call Off.

The window changes from a Quote to a New Call off Order. Enter a description for the Call Off Order. This could be the name of the housing project and the related floor. Ensure the date required is correct and enter an expiry date for this shipment. Now Press Complete. The system assigns a call off order number.

When the customer is ready to start receiving products for the job, the call off order is marked open. Begin by opening the Find Documents folder and setting the Look For field to Call Off Order. Press Go to view the most recent orders.

Locate the order you wish to release lines for and open it. The order is marked as saved, so we'll press Mark As Open. You can now call off individual lines for the order.

Select Call off Lines. Here you can choose which section to release first. Click the plus button next to the row to expand it and see what is included under each subheading. There are several columns that will help keep your Call Off Orders organized. The first column lists each of the products being ordered. The Total Quantity Called Off column, identifies how many of each item have already been called off, or sent to the job site. Since this is the first time we are calling off items from this order, the contents of this column are zero.

The next column, Quantity remaining, shows how many of each object remain to be sent out. Under Call Off Quantity, enter the number for each of the different objects that you are calling off at this particular time. You can call off all items in a specific section by selecting the check box in the Call off Quantity column.

Press OK to complete this call off order. The call off order now become a sales order. Press complete to finish the order and send it out for delivery as you normally would.

When all the products and quantities of a Call off order have shipped, the order will automatically mark itself as complete. If however, a customer has decided that they do not need all the products originally ordered, you can manually mark a call off order complete. Start by opening the Call Off Order. On the upper bar of the screen, select Mark as Complete. A box will appear confirming your action. If, for any reason, you need to re-open the Call Off Order, simply press Mark as Open.

Call Off Orders help keep the sales and delivery process for large projects flowing smoothly. You should now be able to accept one from a quote and call off individual lines. When projects are complete, mark the order as such. This will keep your inventory data accurate and your contractors happy.

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