

Orders Module

This comprehensive manual explains how to manage orders within the application, including viewing existing orders, creating new ones, and exporting order data.

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Orders List Page

The Orders page serves as your central hub for managing all order records. It provides filtering, search, and action options.

Top Filters and Search:

- **Duration / Start Date To End Date:** These fields allow you to filter orders based on their creation date or a specific date range.
- **Client dropdown:** This dropdown allows you to filter orders by a specific client.
- **Search bar:** Type text into this field to search for orders by order number, client name, or other details.
- **Filters button:** Clicking this button might reveal more advanced filtering options.

Action Buttons:

- **Add New Order:**
 - **Purpose:** To manually create a new order in the system.
 - **How to Use:** Click the green "+ Add New Order" button. This will open the "Create Order" form.
- **Export:**
 - **Purpose:** To export existing order data from the system into a file (e.g., CSV, Excel).
 - **How to Use:** Click the "Export" button. This will usually trigger a file download.

Order List Table:

This table displays a summary of your order records.

- **Order Number:** The unique identifier for the order.
- **Client:** The name of the client associated with the order.
- **Total:** The total amount of the order.
- **Order Date:** The date the order was created.
- **Status:** The current status of the order (e.g., Pending, Completed).
- **Action:** This column provides options for managing individual order records:
 - **Edit:** Likely an "Edit" button or icon to modify an existing order's details.
 - **Delete:** A "Delete" button or icon to remove an order record from the system. This usually prompts for confirmation.
- **Current Status:** "No data available in table" indicates that no order records have been added yet.

Table Navigation:

- **Show X entries:** A dropdown to select how many entries are displayed per page (e.g., "Show 100 entries").

- **Showing X to Y of Z entries:** Indicates the current range of entries being displayed out of the total number of entries.
- **Previous / Next buttons:** Used to navigate through multiple pages of orders if there are more entries than displayed on a single page.

Create Order Form User Manual

This section explains how to create a new order in the system. This form appears when you click the "+ Add New Order" button.

Overview of "Create Order" Form Fields

Fields marked with a red asterisk (*) are mandatory.

Order Details Section:

1. Order Number*

- **Purpose:** The unique identifier for the new order. This is usually pre-filled based on your system's prefix settings (e.g.,).
- **Current Setting (Example):**
- **How to Fill:** This field is often auto-generated, but may be editable.

2. Client*

- **Purpose:** To select the client for whom this order is being created.
- **How to Select:** Click the dropdown menu and select the client. There's an "Add" button, implying you can add new clients directly from here.

3. Billing Address

- **Purpose:** To display the client's billing address.
- **Information:** "Select the client to show billing address." This field will populate automatically once a client is selected.

4. Shipping Address

- **Purpose:** To enter a shipping address for the order, if it's different from the billing address.
- **How to Use:** Click the "+ Add Shipping Address" link to open fields for entering a custom shipping address.

5. Project

- **Purpose:** To associate this order with a specific project.

- **How to Select:** Click the dropdown menu and select the relevant project.

6. Generated By

- **Purpose:** Displays the name of the user who is creating this order. This field is typically read-only.
- **Current Setting (Example):** (likely the logged-in user's name).

7. Status*

- **Purpose:** The current status of the order.
- **Current Setting (Example):**
- **Options (Dropdown):** , , , , , .
- **How to Select:** Click the dropdown and choose the appropriate status for the order.

8. Product Selection Area:

- **Purpose:** To add products or services to the order.
- **How to Use:**
 - **Select Product dropdown:** Click to choose a product from your predefined product list.
 - **Add button:** After selecting a product, click "Add" to add it to the order line items.
- **Error Message (Example):** "Add at-least 1 item." indicates that you must add at least one product to the order.

Financial Summary:

- **Sub Total:** The total price of all products added to the order before discounts and taxes.
- **Discount:**
 - **Purpose:** To apply a discount to the order.
 - **How to Use:** Enter a numerical value for the discount. You can typically choose between a percentage (%) discount or a fixed amount.
- **Tax:** The total amount of tax applied to the order.
- **Total:** The final amount of the order after all calculations.

9. Client Note

- **Purpose:** A text area for any notes or specific instructions related to the order that should be visible to the client.
- **How to Fill:** Type your notes into this multi-line text field.

Actions on the "Create Order" Form

- **Submit:** Click the green "Submit" button to finalize and create the order.
- **Cancel:** Click the "Cancel" button to close the form without saving the new order.