

How to Match Deliveries

[AKA Get Rid of Pending Deliveries in Suggested Ordering]

On your site dashboard in Enterprise Web you may see older orders that show up with the status of Exported as in this image

Tasks
Orders 0
Audits 0
Lottery 0

Order Reminders (0 Due Today) Show orders due in next 7 days

	Vendor	Order Rule	Order Date	Due by	Delivery Date	Forecast Adjustment
<input type="checkbox"/>	MR WILLIAMS	Weekly Order	4/3/2022	7:45 AM	4/5/2022	None

Create Selected Delete Selected Create Unscheduled Order...

In Progress and Unreceived Orders

	Status	HH Review Status	Vendor	Order Rule	Order Date	Due by	Delivery Date
<input type="checkbox"/>	Exported ⚠	Review Complete	MR WILLIAMS	Weekly Order	3/27/2022	7:45 AM	3/29/2022
<input type="checkbox"/>	Exported 🚫	Review Complete	MR WILLIAMS	Weekly Order	3/30/2022	7:45 AM	4/1/2022

10 items per page 1 - 2 of 2 items

Before creating your suggested order, these orders should have a status of Received (which actually means they don't show here at all). Here is how to mark an order as received manually in the system.

1. Select the check box next to the order and then click the "Match to Deliveries..." button:

In Progress and Unreceived Orders

	Status	HH Review Status	Vendor	Order Rule	Order Date	Due by	Delivery Date
<input checked="" type="checkbox"/>	Exported ⚠	Review Complete	MR WILLIAMS	Weekly Order	3/27/2022	7:45 AM	3/29/2022
<input type="checkbox"/>	Exported 🚫	Review Complete	MR WILLIAMS	Weekly Order	3/30/2022	7:45 AM	4/1/2022

10 items per page 1 - 2 of 2 items

Recalculate Selected Review On Handheld Cancel HH Review Submit Selected Cancel Selected Order History... Match to Deliveries...

2. A second window will open showing invoices that have been imported into the system for MR Williams. If you do not see the invoice that matches this order, click the “Show older documents” check box:

Match Pending Deliveries for MR WILLIAMS

Selected unmatched orders

Order Rule	PO #	Expected Delivery	Piece Count
Weekly Order	0000018830	3/29/2022	272

Select the invoice or delivery note that recorded the receipt of the selected orders Show older documents

Reference #	PO #	Business Date	Cost	Piece Count	Matched To Order(s)
<input type="radio"/> 2802174		4/1/2022	\$13,359.00	587	No

Match Cancel

Match Pending Deliveries for MR WILLIAMS

Selected unmatched orders

Order Rule	PO #	Expected Delivery	Piece Count
Weekly Order	0000018830	3/29/2022	272

Select the invoice or delivery note that recorded the receipt of the selected orders Show older documents

Reference #	PO #	Business Date	Cost	Piece Count	Matched To Order(s)
<input type="radio"/> 2799346		3/25/2022	\$9,610.84	495	No
<input type="radio"/> 2800558		3/29/2022	\$2,023.17	177	No
<input type="radio"/> 2802174		4/1/2022	\$13,359.00	587	No

Match Cancel

- Select the radio button next to the invoice that matches this order and then click the “Match” button.

Match Pending Deliveries for MR WILLIAMS ✕

Selected unmatched orders

Order Rule	PO #	Expected Delivery	Piece Count
Weekly Order	0000018830	3/29/2022	272

Select the invoice or delivery note that recorded the receipt of the selected orders Show older documents

Reference #	PO #	Business Date	Cost	Piece Count	Matched To Order(s)
<input type="radio"/> 2799346		3/25/2022	\$9,610.84	495	No
<input checked="" type="radio"/> 2800558		3/29/2022	\$2,023.17	177	No
<input type="radio"/> 2802174		4/1/2022	\$13,359.00	587	No

- The order will drop off the list.

In Progress and Unreceived Orders

	Status	HH Review Status	Vendor	Order Rule	Order Date	Due by	Delivery Date
<input type="checkbox"/>	Exported	Review Complete	MR WILLIAMS	Weekly Order	3/30/2022	7:45 AM	4/1/2022

◀ ◁ 1 ▷ ▶ 10 items per page 1 - 1 of 1 items

Recalculate Selected
Review On Handheld
Cancel HH Review
Submit Selected
Cancel Selected
Order History...
Match to Deliveries...

- Repeat the steps for any orders that you have received but are still in the list. If the order does not have an invoice to match to, then the invoice has not been imported from MR Williams yet. Please note that the same invoice can be matched to several deliveries (which is necessary because MR Williams only send one invoice for the two orders we send them).