



MyPromoOffice Job Management

Converting a sales order to a job purchase invoice

If you have any difficulty with following the steps outlined in this help document, please don't hesitate to contact our help team by calling (02) 4302 0160 or via email at help@gunwebsystems.com.au

Document Overview

This document outlines and explains how to access and utilize the job management functions on your My Promo Office site. This document will run you through the following settings/Functions:

- Job Management
- Converting a sales order to a purchase invoice

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Step 1.0

MyPromoOffice – Converting a sales order to a job purchase invoice

Hover your mouse over the “Job” tab.

Step 1.1

Select Manage Job, this appears under the Job header.

Manage Sales Orders

Dashboard View Quotes Sales **Job** Purchase Reports Users Settings Web Store

You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.

Advanced Search

Click manage job.

No.	Created Date	Sales Order Number	Quotation Number	Master Customer	Customer	Customer	System Administrator	Follow-up Status	Urgent Status
1	10-07-2019	SO-000235-1	000235	Gun web systems	GUN WEB SYSTEM MR M A GUNASINGHE	Gun web systems	System Administrator	SO Converted to Job	View Cancel Print PDF
2	15-07-2019	SO-000235-2	000235	Gun web systems	GUN WEB SYSTEM MR M A GUNASINGHE	Gun web systems	System Administrator		View Confirm Cancel Print PDF
3	09-07-2019	SO-000234-1	000234		BWA BWA	gunweb	System Administrator	SO Confirmed	View Confirm Cancel Print PDF
4	03-07-2019	SO-19-000112-1	19-000112		BWA BWA		System Administrator	SO Converted to Job	View Confirm Cancel Print PDF
5	03-07-2019	SO-19-000112-2	19-000112		BWA BWA		System Administrator	SO Converted to Job	View Confirm Cancel Print PDF
6	19-06-2019	SO-19-000108-1	19-000108		Gun Web Systems Test User 2	test sales person		Awaiting artwork	View Cancel Print PDF
7	24-06-2019	SO-19-000108-2	19-000108		Gun Web Systems Test User 2	julian		Awaiting artwork	View Confirm Cancel Print PDF
8	04-07-2019	SO-19-000108-3	19-000108		Gun Web Systems Test User 2				View Confirm Cancel Print PDF
9	04-07-2019	SO-19-000108-4	19-000108		Gun Web Systems Test User 2				View Confirm Cancel Print PDF
10	04-07-2019	SO-19-000108-5	19-000108		Gun Web Systems Test User 2	jacqui		SO Confirmed	View Convert To Job Cancel Print PDF
11	05-06-2019	SO-19-000107-1	19-000107		Anglican Community Fund Inc Helen Kilching			SO Converted to Job	View Cancel Print PDF
12	06-06-2019	SO-19-000107-2	19-000107		Anglican Community Fund Inc Helen Kilching			SO Converted to Job	View Cancel Print PDF
13	27-05-2019	SO-19-000106-1	19-000106		Anglican Community Fund Inc	artwork	Bladon User	SO Converted to Job	View Cancel Print PDF

Manage Jobs

Dashboard View Quotes Sales **Job** Purchase Reports Users Settings Web Store

You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.

Advanced Search

Click view job.

Show Completed Jobs

Displaying 1-20 of 46 result(s).

No.	Created Date	Job Number	Job Name	Quotation Number	Sales Order	Customer	Customer	System Administrator	Follow-up Status	Urgent Status
1	16-07-2019	JOB-000235-72	Marc	000235	SO-000235-1	Gun web systems	GUN WEB SYSTEM MR M A GUNASINGHE	System Administrator	Not Urgent	View Job Complete Create Invoice Print PDF
2	15-07-2019	JOB-19-000112-67	Gunweb systems	19-000112	SO-19-000112-2		BWA BWA	System Administrator	Not Urgent	View Job Complete Create Invoice Print PDF
3	24-06-2019	JOB-000219-46	N/A	000219	SO-000219-1		Gun Web Systems gunweb test	System Administrator	Not Urgent	View Job Complete Create Invoice Print PDF
4	19-06-2019	JOB-19-000108-64	test steel blue	19-000108	SO-19-000108-1		Gun Web Systems Test User 2	test sales person	Urgent Job	View Job Complete View Invoice Print PDF
5	06-06-2019	JOB-19-000107-62	add product	19-000107	SO-19-000107-2		Anglican Community Fund Inc Helen Kilching	test sales person	Urgent Job	View Job Complete Create Invoice Print PDF
6	06-06-2019	JOB-19-000107-59	add product	19-000107	SO-19-000107-1		Anglican Community Fund Inc Helen Kilching	test sales person	Urgent Job	View Job Complete Create Invoice Print PDF
7	06-06-2019	JOB-000231-61	N/A	000231	SO-000231-3	Gun web systems	GUN WEB SYSTEM MR M A GUNASINGHE	System Administrator	Not Urgent	View Job Complete View Invoice Print PDF
8	01-06-2019	JOB-19-000106-58	Bladon test martin 245	19-000106	SO-19-000106-2		Anglican Community Fund Inc Helen Kilching	Bladon User	Urgent Job	View Job Complete Create Invoice Print PDF
		JOB-000231-57					GUN WEB SYSTEM	System	Not Urgent	View Job Complete

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Step 2.0

Click on products, select the relevant products, select purchase from the drop-down list, enter the due date and click create.

1 Click on products.

2 Click the small box, select purchase product. Then click Go.

ID	Image	Product	Product Description	Product Quantity
76		P3200_BIZ Mens Elite Polo	Mens Elite Polo. Sizes: S - 3XL, 5XL Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S	120

Purchase Products

1 Select the due date.

2 Then click create.

ID	Image	Product	Product Description	Qty	Cost Price
76		Mens Elite Polo	Mens Elite Polo. Sizes: S - 3XL, 5XL Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S	120	16.50

BIZ

Step 3.0

Select the required follow up status, select your delivery code, select print PDF.

After this has been completed, select both save buttons as outlined in the image below.

The screenshot shows a web form with the following sections and callouts:

- Internal Use:** A checkbox and a "Comments" field.
- Follow-up Date:** A text input field containing "22-07-2019".
- Follow-Up Status:** A dropdown menu with "Select Follow-Up Status" selected. Callout 1: "Select the required follow up status." with an arrow pointing to the dropdown.
- Upload File:** A "Choose File" button and "No file chosen" text.
- Delivery Details:** A table with columns "ID", "Delivery Details", and "Created By". Callout 2: "Select your delivery code." with an arrow pointing to the "ID" column.
- Add Delivery Details:** A section with "Fields with * are required." and a "Delivery Code" dropdown menu with "Longsprint" selected. Callout 3: "Click Print PDF." with an arrow pointing to the "Print PDF" button at the bottom right.
- Delivery Details:** A text area containing "Long Screen Printing address details".
- Buttons:** Two "Save" buttons, one at the top right and one at the bottom right. Callout 4: "Lastly click both save buttons." with arrows pointing to both "Save" buttons.
- Footer:** A row of checkboxes for PDF options: "Show Decoration in PDF", "Show Price in PDF", "Show Customisation Details in PDF", "Show Notes in PDF", "Show Website Ordering Info in PDF", "Show Product Cost Details", and "Show Job in PDF". Below these are three buttons: "EXPORT PO as XML", "Send Purchase Order", and "Print PDF".

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Step 4.0

Click back to job, select decorations and tick the boxes on the left, this then selects the decoration methods.

Select purchase product decoration, when completed, select go.

The screenshot shows the GunWebSystems interface. At the top, it says "Logged in as gunweb" with a "LOGOUT" button. A navigation menu includes Dashboard, View Quotes, Sales, Job, Purchase, Reports, Users, Settings, and Web Store. Below this is a sub-menu for "View PO #POGG8064" with options: Back to : JOB-000235-72, Consolidate New, Edit Sales Order, Delete Purchase Orders, and Manage Purchase Orders. A red arrow points to the "Back to : JOB-000235-72" link with a callout box that says "Click back to job."

The main content area shows "Purchase Order Header Details" with fields for ID (64), PO Number (POGG8064), Sales Order (SO-000235-1), Job Number (JOB-000235-72), Supplier (BIZ), Po Type (Purchase Product), and Notes. It also shows PO Follow Up Date (22-07-2019), PO Due Date (11-08-2019), Created By (gunweb), and Status (New).

Below this is a table with columns: ID, Image, Product, Product Description, Qty, Product Cost Price, and Amount. It displays one row for a "Mens Elite Polo" with a quantity of 120 and a cost price of 16.50, totaling 1,980.00.

The bottom section is titled "Jobs For Product-Decoration" and contains a table with columns: No, Image, Product, Product Description, and Quantity. It lists two items: "Mens Elite Polo" and "Umbrella Print". Each item has a checkbox in the "Image" column. A red callout box with the number "2" says "Tick all boxes." and has arrows pointing to these checkboxes.

At the bottom of the "Jobs For Product-Decoration" section, there is a dropdown menu set to "Purchase Product-Decoration" and a "Go" button. A red callout box with the number "3" says "select purchase product-decoration and then click Go." and has arrows pointing to the dropdown and the "Go" button.

At the top of the "Jobs For Product-Decoration" section, there is a navigation menu with options: Header Details, CRM, File Attachments, Products, Decorations, Artworks, and All. A red arrow points to the "Decorations" link with a callout box that says "Click decorations." and the number "1".

At the bottom of the page, there are several buttons: "Back to Top", "Job Complete", "PRINT JOB SHEET", "Print Supplier Report PDF", "Print Status Report PDF", and "EXPORT JOB AS XML".

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Step 5.0

Select the supplier, due date, follow up date, follow up status and delivery code.

Then click print PDF and select both save buttons.

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Logged in as gunweb **LOGOUT**

Dashboard View Quotes Sales Job Purchase Reports Users Settings Web Store

Create Product-Decoration PO

Job: JOB-000235-72
Sales Order: SO-000235-1
Date: 2019-07-16

PO Due Date: BIZ PO Follow Up Date: 27-07-2019

No	Image	Product	Product Description	Quantity
1		P3200_BIZ Mens Elite Polo	Mens Elite Polo. Sizes: S - 3XL, 5XL Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S	120

Decoration Code	Decoration Description	Customization Details	Cost Price	Line Amount
custom_decoration	Screen Print to Garment: 1 Colour, 1 Position		3.00	360.00
UMB-1C1P-CP	Umbrella Print: 1 Colour, 1 Panel		2.95	354.00
custom_decoration	any decoration detail		3.00	360.00

Total: 1,074.00
Grand Total: 1,074.00

Create

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Follow up Date: 22-07-2019 Follow-Up Status: Select Follow-Up Status

Upload File: Choose File No file chosen

Delivery Details

ID	Delivery Code	Delivery Details	Created By	Created Date
No results found.				

Add Delivery Details
Fields with * are required.

Delivery Code: Longsprint

Save

Show Decoration in PDF
 Show Price in PDF
 Show Customisation Details in PDF
 Show Notes in PDF
 Show Website Ordering Info in PDF
 Show Product Cost Details
 Show Job Details in PDF

EXPORT PO as XML Send Purchase Order **Print PDF**

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Step 6.0

Select create invoice.

The screenshot shows the GunWebSystems web application interface. At the top right, it says "Logged in as gunweb" with a "LOGOUT" button. A navigation menu includes "Dashboard", "View Quotes", "Sales", "Job", "Purchase", "Reports", "Users", "Settings", and "Web Store". Below this is a secondary menu with buttons like "Create Copy", "Financial Over View", "Manage DO", "Create DO", "Create Invoice", "Manage Invoice : GG8019", "Edit Sales Order", "Edit Job", "PRINT JOB SHEET", and "Cancel". A red arrow points to the "Create Invoice" button, which is also highlighted by a red callout box containing the text "Click create invoice".

View Jobs #46

Mark as Urgent Job Offshore Production Collapse All Sections

Header Details CRM File Attachments Products Decorations Artworks All

Jobs For Products

Displaying 1-1 of 1 result(s).

ID	Image	Product	Product Quantity						
76		<p>P3200_BIZ Mens Elite Polo</p> <p>Supplier: BIZ</p> <p>Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S</p> <table border="1"><thead><tr><th>Size</th><th>Qty</th><th>Color</th></tr></thead><tbody><tr><td>L</td><td>120</td><td>Blue</td></tr></tbody></table>	Size	Qty	Color	L	120	Blue	120
Size	Qty	Color							
L	120	Blue							

Select an Activity Go

Back to Top Job Complete

PRINT JOB SHEET Print Supplier Report PDF Print Status Report PDF EXPORT JOB as XML

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Step 7.0

Select the product box, enter the due date and any additional comments.

Then proceed to select create invoice.

ID	46
Quotation Number	000235
Job Number	JOB-000235-72
Sales Order	SO-000235-1
Mater Customer	Gun web systems
Customer	GUN WEB SYSTEM MR M A GUNASINGHE

Available products to invoice Displaying 1-1 of 1 result(s).

ID	Image	Product Description	Decoration	Product Quantity	Selling Price Excluding GST	Total Excluding GST
<input checked="" type="checkbox"/> 145		Mens Elite Polo Supplier: BIZ Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S	1. custom_decoration Screen Print to Garment: 1 Colour, 1 Position 2. UMB-1C1P-CP Umbrella Print: 1 Colour, 1 Panel 3. custom_decoration any decoration detail	120	39.09	4690.8
Sub Total :						4,690.80
GST :						469.08
Total :						5,159.88
Paid Amount :						0.00
Balance :						5,159.88

Due Date: 31-08-2019

Comments:


1 Tick the product box, select the due date and add any comments required.

2 Then click create invoice.

Create Invoice

ID	Payment Date	Description	Amount
No results found			

Total 1 result(s).

ID	Image	Product Description	Decoration	Qty	Selling Price Excluding GST	Total Excluding GST
19		P3200_BIZ Mens Elite Polo Supplier: BIZ Fabric: BIZ COOL 100% Breathable Polyester Textured mini self-check patterned fabric 170 GSM UPF rating - Excellent Features: Contrast self fabric trim on placket and sleeve hem Contrast tipping on knitted collar S Size: L Qty: 120 Color: Blue	1. custom_decoration Screen Print to Garment: 1 Colour, 1 Position 2. UMB-1C1P-CP Umbrella Print: 1 Colour, 1 Panel 3. custom_decoration any decoration detail	120	39.09	4,690.80
Sub Total :						4,690.80
GST :						469.08
Total :						5,159.88
Paid Amount :						0.00
Balance :						5,159.88

Special Comment

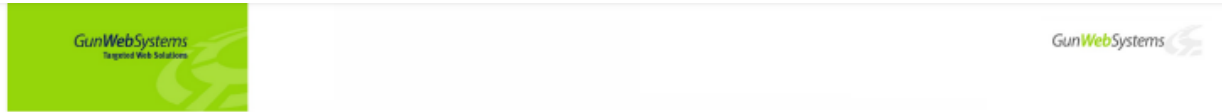
Select print PDF.

Show Long Description in PDF Show Decoration in PDF Show Price in PDF Show Customisation Details in PDF Show Notes in PDF

[Resend PDF & CSV](#) [Send Invoice](#) [Print PDF](#)

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The invoice should look like the image attached below.




INVOICE

GG8019

Quotation Number : 000235
 Customer : GUN WEB SYSTEM
 Address : state, Address 3, State
 E-mail : marc@gunwebsystems.com.au
 Telephone : 0243020160

Date : 16-07-2019
 Job Number : JOB-000235-72
 Sales Order Number : SO-000235-1
 PO Number :
 Sales Person : System Administrator

No	Image	Product	Decoration	Qty	Unit Price (excl GST)	Total (excl GST)
1		P3200_BIZ Mens Elite Polo	1. custom_decoration Screen Print to Garment: 1 Colour, 1 Position 2. UMB-1C1P-CP Umbrella Print: 1 Colour, 1 Panel 3. custom_decoration any decoration detail	120	39.09	4,690.80
#	Size	Quantity	Color			
1	L	120	Blue			

Sub Total : 4,690.80
 GST : 469.08
 Total : 5,159.88
 Paid Amount : 0.00
 Balance : 5,159.88

How to pay



by credit card
 To pay via MasterCard or VISA.
by Phone
 Quote Ref: Invoice Number



by mail
 Detach this section and mail your cheque to...



by direct deposit



in person

Present this invoice to make a payment