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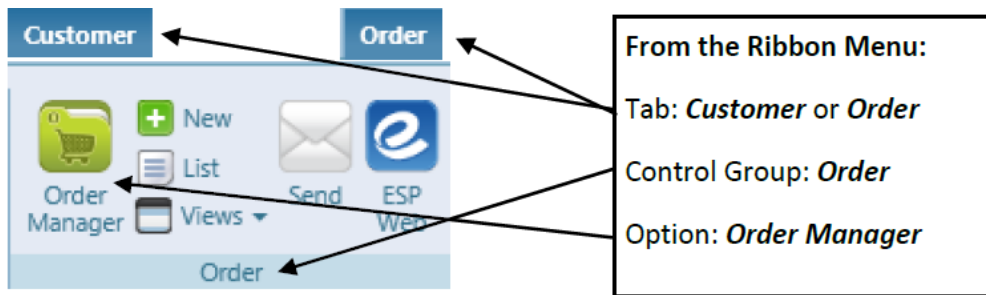
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How Do You Preview a copy of the order?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

How Do You Preview a copy of the order?

Select the order in a manage window and change the **Views** to the form to preview



Explanation: The order forms are available to be view on the screen either through the view option in the header of the edit section of the Order Manager.

Load the Order Manager option. Select the order from the list so that it populates the edit tool at the bottom by clicking once on the Customer Name. Once the order populates, select the View of the form to preview. That form will load in the edit portion of the screen.

Order ✕

This 6 Months Open

Order	Bill To Name	Status	Products	Service
679	State Farm Insurance	<input checked="" type="checkbox"/> Open	(2)	
677	Allied Insurance	<input checked="" type="checkbox"/> Open	(1)	
676	State Farm Insurance	<input checked="" type="checkbox"/> Open	(2)	

New Import Close

- Notes
- Costing
- Tracking
- Package
- Acknowledgement - State Farm Insurance
 - Order-Commission - John Smith (promos)
 - Order-Internal - 676
 - Purchase Order - Alpha Shirt Company
 - Purchase Order - Embroider and More
 - Invoice - 10491

There is also a preview option in the Send view of an order.

Order - 1710 ✕

Close Views

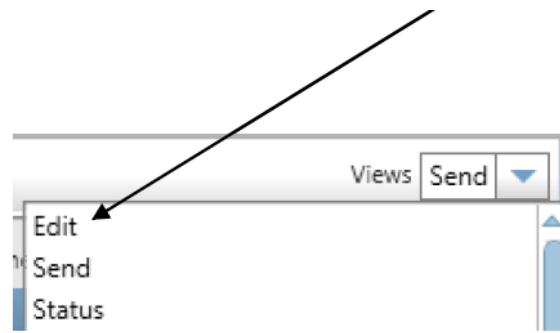
Send Order 1710 Documents

Document	Contact/Company	Last Date	Send Method	Email Form	Print Form	
▼ Acknowledgement	Gregory Meyer / Allied Insurance		None	Plain Paper	Plain Paper	<input type="button" value="Send"/> <input type="button" value="Preview"/>
▼ Order-Commission	Jane Doe		Email	Plain Paper	Plain Paper	<input type="button" value="Send"/> <input type="button" value="Preview"/>
▼ Order-Internal			Print	Plain Paper	Plain Paper	<input type="button" value="Send"/> <input type="button" value="Preview"/>
▼ Purchase Order	All Sport		Print	Plain Paper	Plain Paper	<input type="button" value="Send"/> <input type="button" value="Preview"/>
▼ Proforma Invoice	Tracy Moore / Allied Insurance		Email	Plain Paper	Plain Paper	<input type="button" value="Send"/> <input type="button" value="Preview"/>

New document

- Edit
- Send
- Status
- Service
- Notes
- Costing
- Tracking
- Package
- Record Audit
- Acknowledgement - Allied Insurance

If changes are necessary on this form, change the view back to Edit and make the appropriate changes and preview the form again.



NOTE: If you print or email from the Preview option, this does not update the document Status of the document. You must print or email from the SEND view.