The Order Book

Getting Started · https://mountainstream.co/docs/the-orderbook/

Standing Orders, Carts and Late Orders

Once the item catalogue and customers have been configured, we are ready to enter orders and get the order book up to date.

As you enter orders, you may keep in a separate tab: **Production › Total Orders › Weekly**, and refresh as you enter orders. You will see weekly production at a glance. This report may be configured to your liking saved to Shortcuts.

Enter all:

- Standing Orders.
- One-off orders using Cart – you may save carts for ease of re-ordering.
- Amend standing orders on a one-off basis using the cart: the cart loads a specific delivery date and if there is a standing order for the selected address and date, **by default** it will be loaded to edit it for that date only, The following week the standing order is reinstated.
- When a customer misses the order deadline, only an administrator is able to enter Late Orders and amend orders already in production.

As you enter orders, all reports update automatically, including invoices. You must refresh the page to see the changes.

Carts and Late Order windows may be configured to load:

- Blank
- Frequently ordered items
- All items visible to the customer

Additionally, they may be configured to sort:

- Alphabetically
- Same as the item catalogue

The following video tutorial explains how the standing order and carts work in tandem: use the cart to edit the standing order on a one off basis. The video is sent to your customers when inviting them to use Streamline.

Embedded media: https://player.vimeo.com/video/125445291?dnt=1&app_id=122963

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