Create a new standing order

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Learn how to create a standing order in Amlib.

Allows the Order to be open and available for addition of new Order items as required. This can be used by Sites having a Standing arrangement with a Supplier, whereby they provide an Order Number to a Supplier, which is used throughout the year to supply Orders on an ongoing basis.

Standing Orders are able to be invoiced at any time and the Order Header Status does not need to be changed to enable Invoicing. With normal Amlib Orders, the Order Header needs to become a Status of ORDERED prior to Invoicing. However with Standing Orders, they can have a Status of STANDING and still be available to Invoice.

Items can be added to Order Headers with a status of STANDING even though some items have been Invoiced.

It is possible to manually set the Standing Order to Invoiced when required to “close off” the Standing Order. This Menu option is found in the Transactions menu. To set the Standing Order to Invoiced, all Order Lines must be either Invoiced or Cancelled. This option is only available for Orders with a status of STANDING.

1. Launch the Amlib client
2. Go to Main > Orders > OrderHeader – the Order Header screen will display (alternatively, type Ctrl-O)
3. From the menu, select Transactions > New Standing Order – the Order Header screen will go into creation mode (the F2 Insert button will become bolded and STANDING will appear in the Status field)
4. Enter the Order Number (unless automatically generated), Summary, Supplier as you would a Normal Order.
5. Select F2 Insert
6. Enter the Order Lines as normal

New Line

No Order Lines exist for the specified Order Header so a new Order Line will be created. Does the new Order Line contain Stock Items?

[Yes] [No] [Cancel]
7. As the item are received, Invoice as required. The Order remains as STANDING and can be added to throughout the year, even though some Order Lines are already Invoiced.
8. Set Status to Invoiced

This option is only available to manually set the Standing Order to Invoiced. Usually this is required after a period of time to “close off” the Standing Order. To set the Standing Order to Invoiced, all Order Lines must be either Invoiced or Cancelled. Only Standing Orders can manually be set to Invoiced. Normally this is done automatically once all Order Lines are Invoiced.