

# The Pending List Window

# Understanding the Pending List Window

(Basic & Full Versions only)

The pending list is a window which allows you to view the status of your orders. The window is constructed in 4 formats, Open Orders, Completed Orders, Account Receivables, and Browse Quotes.

**Open Orders:** This view displays any order which has not been marked as completed and is still in the store. It is still “open”.

**Completed Orders:** This view displays orders which are no longer open but are marked as “completed” and have not yet been picked up by the customer. When an order is marked as “Picked Up”, it is removed from this view, but will still appear in the Customer History window.

**Account Receivables:** This view displays orders (regardless of status) which have remaining balances.

**Browse Quotes:** This view displays all orders which are marked as Quotes. Quotes can be changed into Open Orders by clearing the Quotes checkbox.

## To change a single work order's status:

1. Mark the order you want to work with so a red mark appears to the left.

M	Due Date	First name	Last name	Corporate Name	SI	W/O No.	Image Description
<input checked="" type="checkbox"/>	4/11/08	John	Doe	Nutech		1,000	Picture Of Dog

2. If the order is an open order, click Browse Open Orders button at the top left.
3. If the order is a completed order, click Browse Completed Orders button at the top left.
4. If the order is a Quote, click the Browse Quotes button at the top left.
5. Check the appropriate check box in the green box at the bottom left to change a status.

<b>Paid No</b>
<input type="checkbox"/> Completed
<input type="checkbox"/> Picked up
<input type="checkbox"/> Quote

6. You can also click the Change Work Order Status button which offers more details and options.

Changing Status for --> John, Doe - 800.404.0634 - Nutech Invoice Nu...

**Change Work Order Status** Work Order Number 1,000

Change Work Order | Order Status | 0.00

**Check Quote to Disable Checkboxes**

First John W/O Date 3/28/2008  
Last Doe Due Date 4/11/2008  
Company Nutech

Paid  Completed  Picked Up Date  
Date Paid  Quote  Rush Order Art Work Location  
Finished Location Item

Image Description  Check Box to Change Invoice to Quote  
Picture Of Dog  
Other Items Needed to Complete Work Order  
None  
Special Instructions

Inv. Balance 328.71

Tax Exempt and Number  Sales Tax and Date Paid

Help  
Cancel Changes  
Save Changes

- Once your changes are made click Save Changes if in the Change Work Order Status window.
- Now your order will be moved to the appropriate status display. For example, if you had a Quote and you unchecked the Quote box, it will automatically be moved to the Open Orders view.

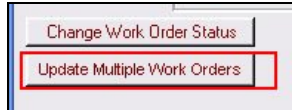
**To change the status on multiple work order's at once:**

Depending how your tracking system is set up, it may be that at the end of each day you take all the completed work order copies and want to update a number of orders to change them from open to completed. We have made this easy!

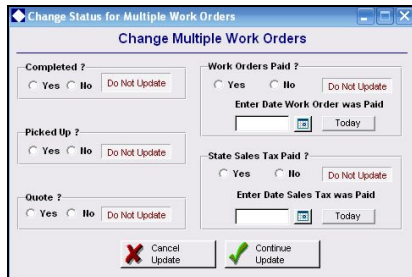
- In the Pending List window, go to the view you are working with. In our example we will go to the Open Orders view by clicking the Browse Open Orders button.
- Holding your CTRL key down on your keyboard, click on each row for each of the orders you want to upgrade to completed.



- To unselect a highlighted row, simply click the row again (all the while holding your CTRL key down).
- Once your orders are highlighted, click the Update Multiple Work Orders button at the bottom left of the window.



- In the window which appears select the status you want to update your orders to.



- ezFramer will then process those records and move them to the Completed Orders view. To view them, click the Browse Completed Orders button.

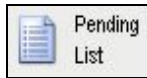


7. To move an order back to its previous setting, simply follow the same steps but select the new appropriate selection you desire.
8. When finished, click Close.

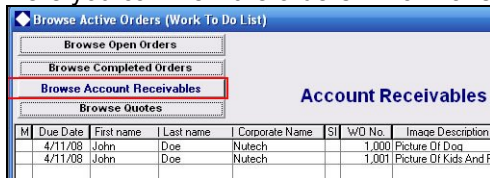
## View Accounts Receivables

(Basic & Full Versions only)

1. Click the Pending List window icon along the top tool bar.



2. Click the Browse Account Receivables button at the top left of the window.
3. Here you can view the orders which have not been paid.



4. To print a statement from here, use the Print Action List drop down.



5. You can also print individual Invoices for each order from this window.
6. Note: Remember you can use the mailing feature to print mailing labels and envelopes to your customers!
7. Note: You can take payments from this window too!