



## Modify an Order Schedule

Background: Allows you to make changes to an existing Order Schedule.

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### To Do and Notice:

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1. Navigate to **Purchasing** and select **Schedules**.
2. Select **Edit Order Schedule**.
3. Search for the desired Order Schedule.  
**Notice:** If the Search screen does not appear, click on the Search button in the upper right-hand corner.
  - 1) Unit
  - 2) Description
  - 3) Dates
  - 4) Click **Go**
4. Click the tab that displays the information in a manner most convenient for you.  
**Notice:** Each tab displays the same information, sorted differently.
  - By Vendor
  - By Storage Area
  - By Product Group
  - By Purchase Group
5. Click on the name of the Item to view the Details window, which contains everything that contributes to the final calculation of the order amount and dates.  
**Notice:** See the **Order Schedule Details** Quick Guide for a complete description of the Details window.
6. Click **Done** to close the Details window.
7. Print one of the four Order Schedule reports and check the inventory in your storeroom, making note of anything you might need to change on your order.  
**Notice:** See the **Print Order Schedule Reports** Quick Guide for instructions on how to print a report.

8. Make any required changes to the items.
  - **Add Items** – Click Add Items button to add items to the Order Schedule
  - **Delete Checked** – Click the box in front of the Item you wish to delete, then click the Delete Checked button
  - **Delete All** – Click to delete all items from the schedule
  - **Filter** – Allows you to narrow down the information displayed on the page
9. Edit order quantities for each day of the schedule, if needed.
10. Click the **Vendor Item** drop-down list and select the appropriate item, if you need to change the linked Vendor Item.
11. Click **Save**.
12. If you wish to create an order, continue to the next step; otherwise click **Done**.

### Create Orders

13. Click on the **Create Orders** button in the upper right-hand corner of the screen.

**Notice:** Several Orders will be created based on the schedules, vendors, and also vendors' order/delivery schedules.
14. Enter the desired search criteria in the Open Orders window:

1) Unit	4) Dates
2) Vendor Name	5) PO Number
3) Order Status	6) Click Go
15. Click **Done**.

**Notice:** See the **Print Order Schedule Reports Quick Guide** for instructions on running and Printing Order Schedules.

**So What?** Based on the analysis performed by the Schedules function, the order schedule lists an "order amount" (the suggested quantity to order to meet the anticipated needs) for each item and determines order/delivery dates.