

# **ROSS DISPATCH**

## **ADVANCED 2 – PREORDERS**

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### **OBJECTIVES**

Upon completion of this unit, the trainee will be able to:

1. Create and edit a Preorder.

## I. 'PRE-ORDERS' SCREEN

### Summary.

- Accessed by 'Resource' menu.
  
- Used to create Pre-Orders, which are preestablished groupings of catalog items and their quantities used for expedited resource ordering.
  
- A Pre-Order is different from a configuration in that:
  - It does not have a 'root' catalog item.
  - When ordered, it results in separate requests for each item (versus subordinate requests for a configuration).
  
- Pre-Orders appear on 'Pre-Orders' tab of 'New Request' screen.

### A. Top section of screen.

- Select a Catalog from drop-down menu.
- Select a radio button.

### B. 'Pre-Orders' section of screen.

- Table displays, for each Pre-Order:

- Pre-Order Name.
  
- Whether available nationally.
  
- Creating a new Pre-Order:
  - 'New' button.
  
  - Enter Pre-Order name.
  
  - Enter purpose.
  
  - 'Available Nationally' check box.
  
- Editing a Pre-Order:
  - Select Pre-Order.
  
  - 'Edit' button.
  
  - Revise information.
  
- 'Delete' button.

C. Tabs section of screen.

1. 'Pre-Order Contents' tab – Used to add/remove catalog items from selected Pre-Order.

- 'Catalog' tab – Can filter by catalog and category.
- Use '>' and '<' arrows to add/remove items. Alias catalog items can be added to a Pre-Order.
- 'Filter' tab – Provides additional filter criteria.
- 'Pre-Order Contents' table.
- Click in quantity field to change, then click 'Save'.

2. 'Organizations' tab – Only applicable to Pre-Orders 'Available Locally'. Used to specify dispatches with access to selected Pre-Order.

- 'Filter for Organizations' section of tab.
- 'Organizations with Access to Order'.