Processing your orders in the Order Manager

On this page we explain how you receive, confirm, ship and invoice your buyers' orders in the new Order Manager — one order from start to finish, without your own EDI system.

Sign in to the Order Manager

Go to My Onetrail and log in. Your username and password are provided by Onetrail by email. Open the **Orders** tab — you are now in the Order Manager. Your seller company and its GLN are shown at the top right.

Every order moves through the same four stages, and each stage you complete sends a message back to your buyer: **Received Confirmed Shipped Invoiced**. You don't have to do them all at once — an order waits at its current stage until you act on it.

Find the order you need

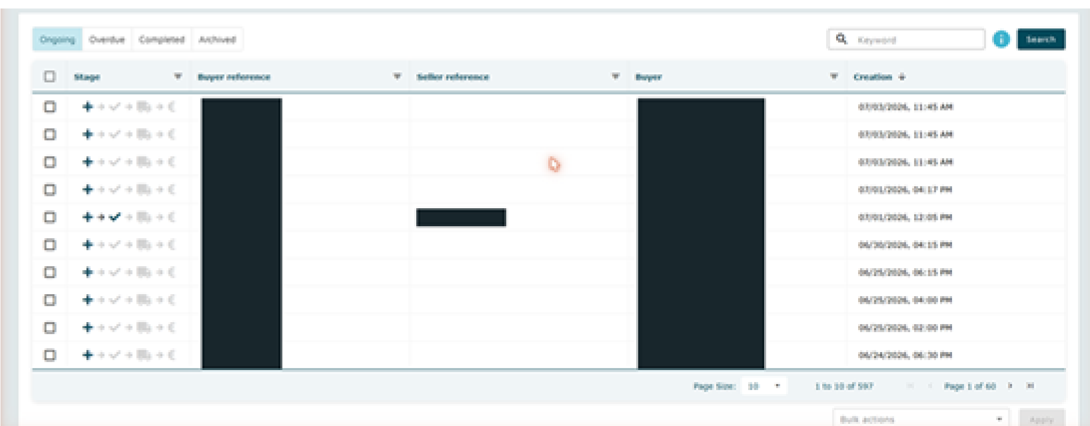
The **Orders** screen lists every order for your company. The four category tabs at the top left split them up:

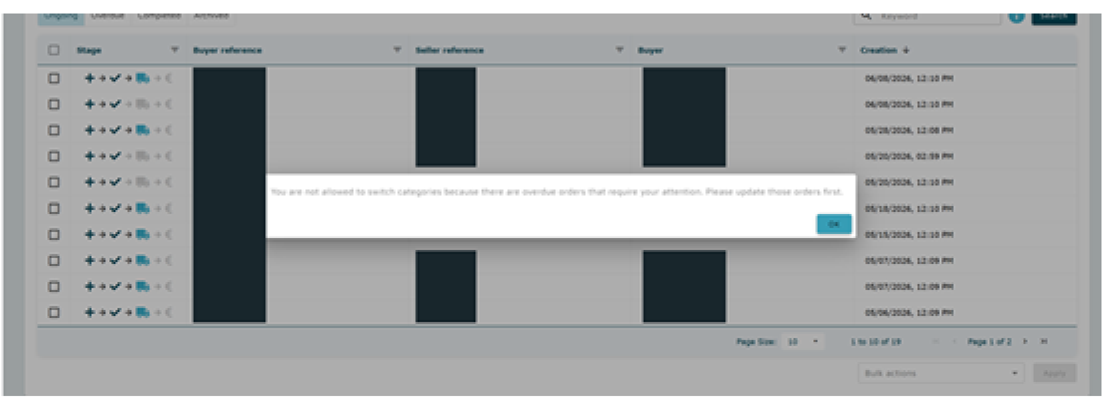
- **Ongoing** — orders that need your action.
- **Overdue** — orders past their scheduled delivery date.
- **Completed** — orders that are fully processed.
- **Archived** — orders you have archived and no longer want to see.

Use **Search by keyword** (top right) to jump straight to an order by reference, and filter any column from its header. The **Stage** column is the quickest read: its four icons light up left to right as an order progresses, so you can see at a glance what still needs doing.

Once you've found your order, you take it through four steps:

1. **Open and check** the order
2. **Confirm** the order
3. **Ship** the order
4. **Invoice** the order





> **Overdue orders come first**
>
> If your company has overdue orders — confirmations past their scheduled delivery date — the Order Manager opens on the **Overdue** tab and won't let you switch tabs until those are dealt with. The block is company-wide, so a colleague's overdue orders hold you back too. Clear it by opening each overdue order and updating its confirmation.

Step 1: Open and check the order

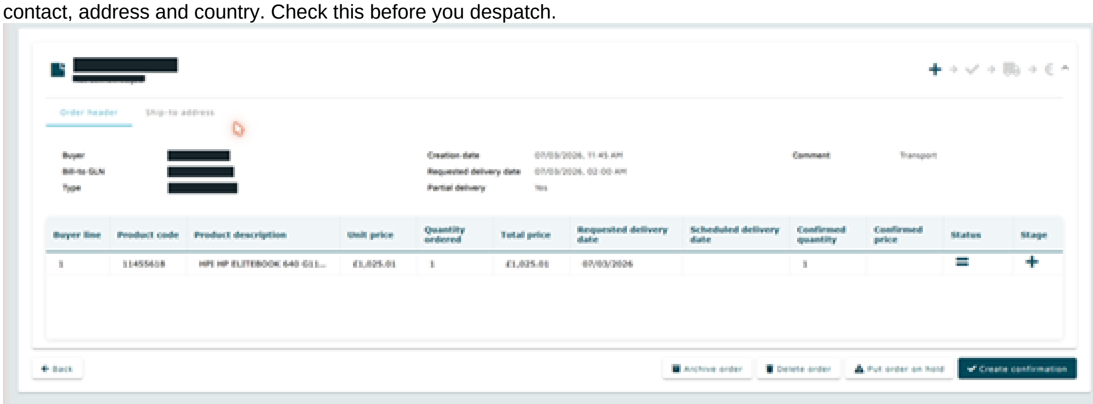
Click any row to open the order. The status sits under the order number (for example *Not acknowledged*), with the Stage track top-right and the next-action buttons along the bottom.

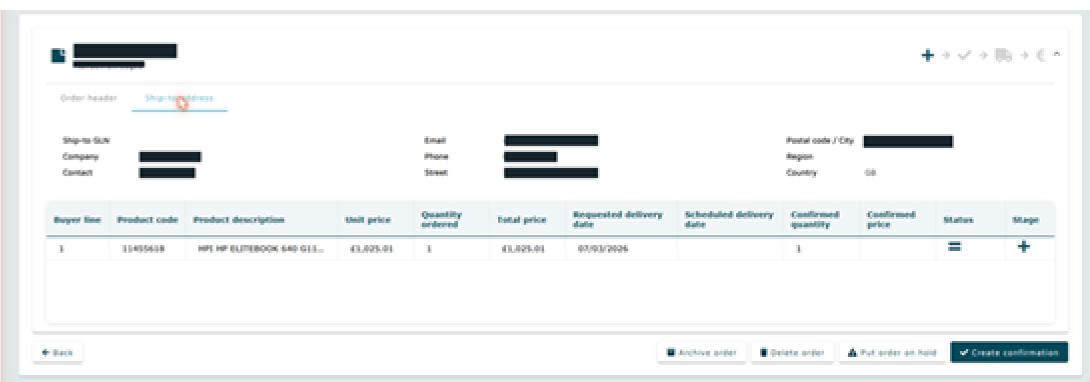
Order header & lines

The **Order header** holds the order-level facts: buyer and bill-to GLN, order type, creation and requested delivery dates, whether partial delivery is allowed, and any comment. Each **order line** shows the product, unit and total price, quantity ordered and requested delivery date — and gains a scheduled date, confirmed quantity and confirmed price once you confirm.

Ship-to address

The **Ship-to address** tab shows where the goods go — GLN, company, contact, address and country. Check this before you despatch.



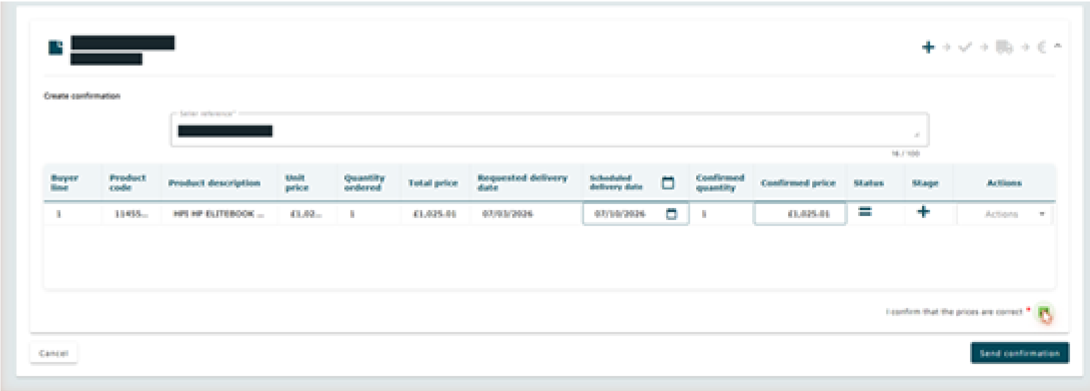


Step 2: Confirm the order

Confirming tells your buyer you accept the order and on what terms. It sends an order response and moves the order to **Confirmed**.

1. Open the order and click **Create confirmation**.
2. Enter a **Seller reference** — your own order number for this sale.
3. Set the **Scheduled delivery date** for the line.
4. To set the same date for the whole order at once, use the calendar icon in the **Scheduled delivery date** column on the header row — it applies to every line.
5. Adjust the **Confirmed price** if it differs from what was ordered.
6. To adjust the **Confirmed quantity**, use the **Actions** drop-down to split the line. Note: the order quantity must equal the ordered quantity.

7. Tick **I confirm that the prices are correct**.
8. Click **Send confirmation** — a "1 order processed successfully" message appears.



> **Required to send**
>
> Seller reference, a scheduled delivery date on every line, and the prices-are-correct checkbox. The form won't send until all three are set.

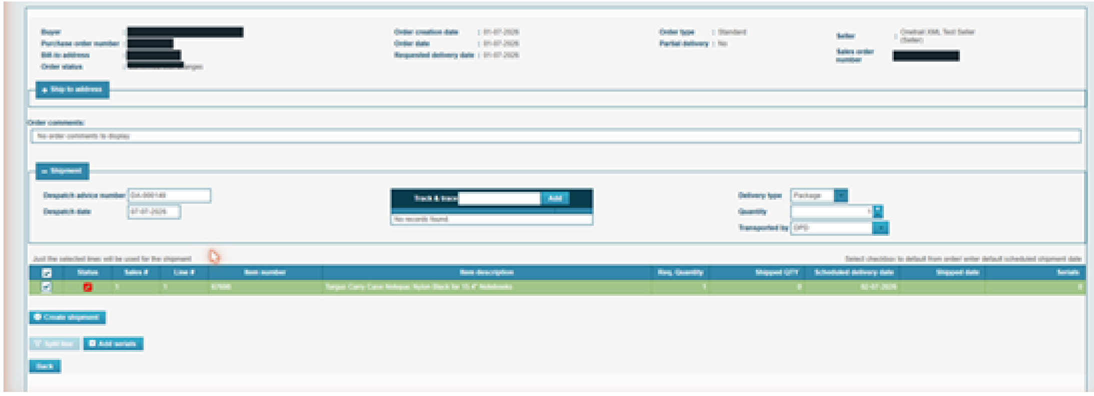
Confirmed vs. confirmed with changes
If the values you send back match the order, its status becomes **Confirmed**. If anything differs — a changed price, a split line, or a delivery date later than requested — it becomes **Confirmed with changes**, and your buyer sees exactly what you altered.

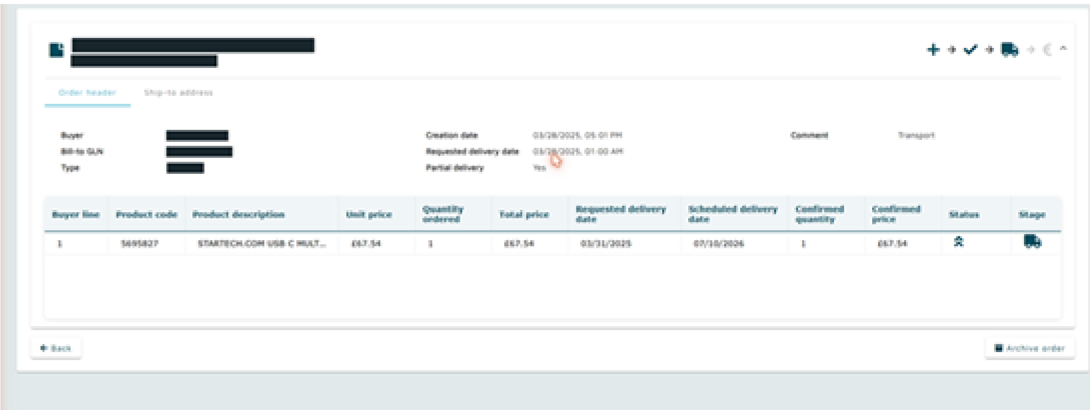
Step 3: Create a shipment

Creating a shipment tells your buyer the goods are on their way. It sends a despatch advice and moves the order to **Fully shipped**.

> **Before you start**
>
> Shipping needs at least one carrier set up for your company — the **Transported by** list is drawn from your configured carriers. If it's empty, ask your Onetrail contact to add your carrier(s) first.

1. On the confirmed order, click **Create shipment** to open the shipping screen.
2. Tick the line(s) you're shipping — only ticked lines are included.
3. Enter the **Despatch advice number** (your delivery-note number) and the **Despatch date**.
4. Choose a **Delivery type** and a **Transported by** carrier.
5. Optionally add track & trace keys, or use **Split line** for a partial shipment.
6. Click **Create shipment**, then **Confirm**.



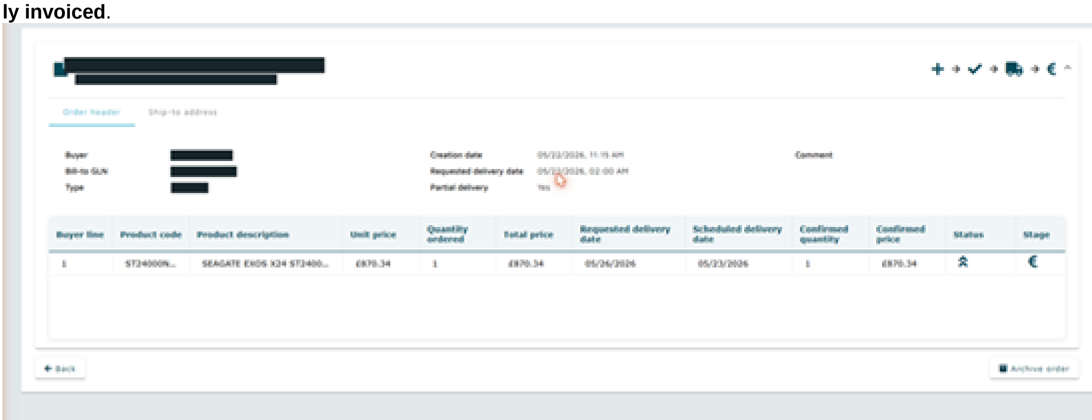


The confirm step is final

The dialog reminds you to check the lines and quantities and warns that a shipment cannot be changed once confirmed. It also flags if you're shipping without track & trace keys. If quantities are wrong, use **Split line** before confirming.

Step 4: Create the invoice

The final stage bills your buyer. Once an order is shipped, a **Create invoice** action becomes available; completing it sends the invoice and moves the Stage track to its last node. The order then appears under **Completed** as **Fully invoiced**.



Order complete

That's the full loop — received, confirmed, shipped and invoiced. Your buyer has had a structured message at every stage, with no EDI system needed on your side.

The four stages at a glance

Stage	Your action	Message sent
Received	Review the order	ORDER
Confirmed	Create confirmation	ORDER_RESPONSE
Shipped	Create shipment	DESPATCH_ADVICE
Invoiced	Create invoice	INVOICE

Your My Onetrail dashboard

Next time you sign in, the top-right corner of My Onetrail shows the status of your products and orders. The **Check orders** button links straight to your orders in progress, and the dashboard carries news and maintenance notifications.

Need help?

Any questions about processing your orders? Contact Onetrail Customer Care via our support page — we're happy to help. If you don't have a Servicedesk account yet, request one by emailing support@onetrail.com.