

BUZ Status



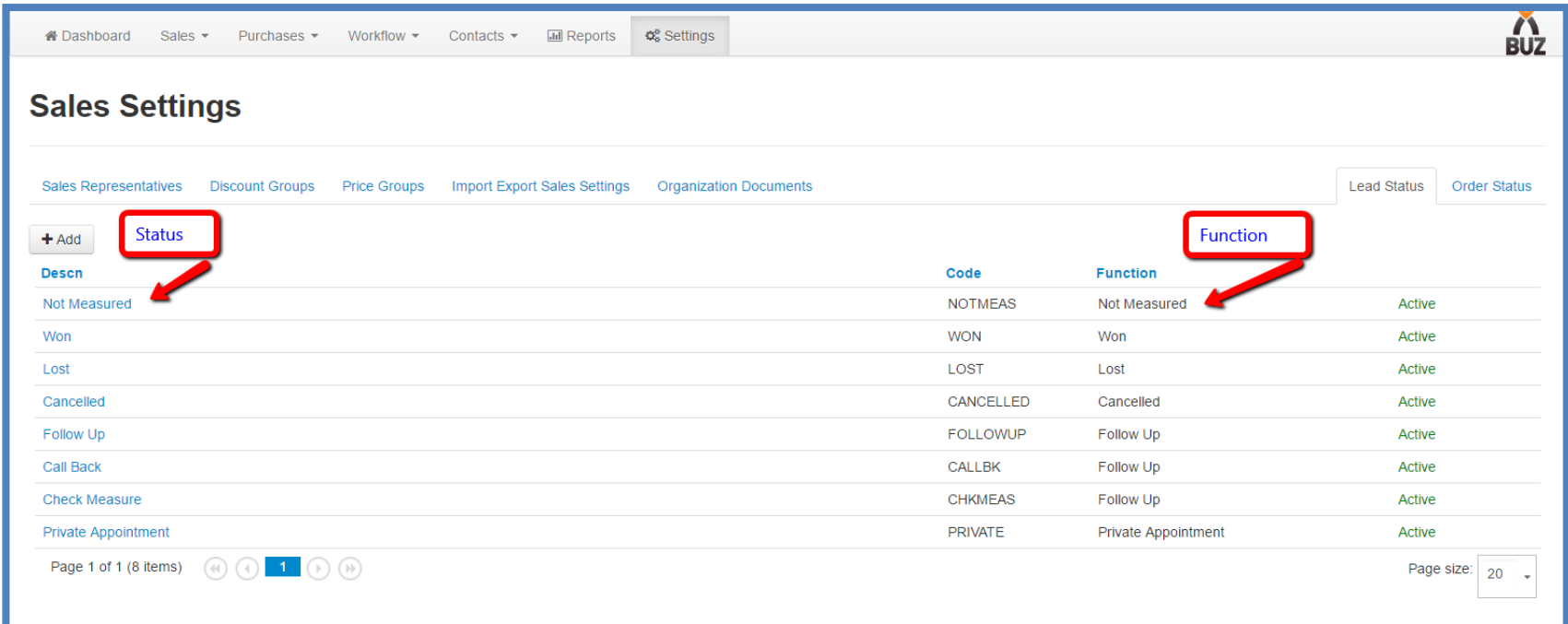
Status

There are a few areas in BUZ where you have Status'

1. Leads
2. Order
3. Job Tracking
4. Dispatch

All of these Status are linked at some point so that you move your Quotes through to Orders and then to Dispatch

Each Status has a Function and these functions help BUZ and you to know where everything is up to and what Documents you can print and email



The screenshot shows the 'Sales Settings' page in the BUZ software. The page has a navigation bar with 'Dashboard', 'Sales', 'Purchases', 'Workflow', 'Contacts', 'Reports', and 'Settings'. The 'Settings' tab is active. Below the navigation bar, there are tabs for 'Sales Representatives', 'Discount Groups', 'Price Groups', 'Import Export Sales Settings', and 'Organization Documents'. The 'Lead Status' and 'Order Status' tabs are also visible. A table lists the status settings, with 'Status' and 'Function' columns highlighted by red boxes and arrows. The table has columns for 'Descn', 'Code', 'Function', and 'Active'. The 'Status' column is highlighted with a red box and an arrow pointing to the 'Not Measured' status. The 'Function' column is highlighted with a red box and an arrow pointing to the 'Not Measured' function. The table contains 8 rows of data. At the bottom of the page, there is a pagination control showing 'Page 1 of 1 (8 items)' and a 'Page size' dropdown set to 20.

Descn	Code	Function	Active
Not Measured	NOTMEAS	Not Measured	Active
Won	WON	Won	Active
Lost	LOST	Lost	Active
Cancelled	CANCELLED	Cancelled	Active
Follow Up	FOLLOWUP	Follow Up	Active
Call Back	CALLBK	Follow Up	Active
Check Measure	CHKMEAS	Follow Up	Active
Private Appointment	PRIVATE	Private Appointment	Active

Lead Status

Lead Status help you to see what they need to Measure, follow up on, who has cancelled, what has gone ahead and when your Rep is out of the office on a private appointment. They are also used by BUZ to generate reports such as Conversion rates.

Description	Function	Meaning
New Lead	Not Measured	New lead, not yet seen by rep
Won	Won	Lead has converted to a sale
Lost	lost	Lead was not converted to sale
Cancelled	Cancelled	Cancelled appointment
Follow up	Follow up	Follow up appointment booked from quote

Sales Settings

[Sales Representatives](#)
[Discount Groups](#)
[Price Groups](#)
[Import Export Sales Settings](#)
[Organization Documents](#)

Description

Not Measured

Code

NOTMEAS

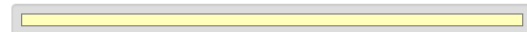
Function

Not Measured

Sequence Number

10

Color:



Cancel

Save

Deactivate

Send Email on Status Changed?

Email Template:

Quote

NB: If you have multiples statuses with the same function the status that is first in sequence is the status that will prompt that function when required. Email can also be set up to send out on the change of Status.

Order Status

Order Status helps you and customer Users keep track of where the order is up to in Production.

Description	Function	Meaning
Quote	Quote	Quote (not yet accepted)
Needs Minimum Deposit Approval	Deposit approval needed	Deposit added and Requires min deposit approval
Discount Approval Needed	Discount approval needed	Discount exceeded max discount and requires discount approval
Declined (Lost)	Lost	quote - declined never accepted
Accepted (Needs Processing)	Needs Processing	manual process is required for a quote or rework that has been accepted
Needs Remote Finalizing	Needs Remote order Finalize	Accepted Buz 2 Buz needs finalizing from supplier
Pending (Waiting for) Check Measure	Waiting for check measure	Accepted waiting for check measure
Work in Progress	Work in progress	Accepted didn't require approval or has been approved and either has no check measure or check measure has been completed)
Cancelled	Cancelled	Accepted then order Cancelled
Invoiced (Complete)	Complete	Invoiced/completed
Credit Note	Credit Note	Credit note not an order applicable to invoiced orders
Credit Approval Needed	Customer Credit Approval Needed	Credit Approval Needed exceeded max credit limit

NB: If you have multiples statuses with the same function the status that is first in sequence is the status that will prompt that function when required. Email can also be set up to send out on the change of Status.

Job Tracking Status

These help you move the order through production / Job Tracking and your customer Users can see where the order is at.

Description	Function	Meaning
Unstarted	Unstarted	Order has been accepted and Processed but not started in factory
Waiting for Check Measure	Waiting Check Measure	Order Waiting Check Measure
Commenced	Confirmed	Order has Commenced Production
On Hold	Hold	Order is on Hold
Completed	Completed	Order has Completed Production
Cancelled	Cancelled	Order has been cancelled

NB: If you have multiples statuses with the same function the status that is first in sequence is the status that will prompt that function when required. Email can also be set up to send out on the change of Status.

Dispatch Status

Dispatch Status help you move orders through Dispatch area. The Customer users can also see where their order is up to in Dispatch

Description	Function	Meaning
Unconfirmed	Unconfirmed	This is the status when an order is accepted and the dispatch date is not confirmed.
Confirmed	Confirmed	This is the status when an order is accepted and the dispatch date is confirmed (told to customer).
Final Confirmed	Final Confirmed	This is the status when the customer is called the day before Installation to confirm.
Dispatched	Dispatched	Product has been sent.
Complete	Complete	In the case of an installation this is when the Installer says the product has been installed.
Check Measure Complete	Check Measure Complete	When a Check Measure is requested this indicates it has been done and makes the order available to Job Tracking for Production or Ordering on Supplier.
Cancelled	Cancelled	This can only be set by the system when the order is cancelled.
On Hold	On Hold	Indicates order not to be installed.
Is Re-Book	Is Re-Book	New dispatch as the result of a Re-Book. Often this would be setup twice 1. Re-booked by Customer and 2. Re-booked by Office.
Is Re-Make	Is Re-Make	New dispatch as the result of a Re-Make.
Is Re-Work	Is Re-Work	New dispatch as the result of a Re-Work.

NB: If you have multiples statuses with the same function the status that is first in sequence is the status that will prompt that function when required. Email can also be set up to send out on the change of Status

Notes

Things to remember

- When setting up Statuses a Function Code must be set so that BUZ knows how to treat the status

Field	Description
Description	Full text description of status, max. 30 characters.
Code	Abbreviation for status, max. 10 characters.
Function	See separate table of associated actions.
Sequence Number	The order the status list in the dropdown. This also sets the logical order these occur in so when order items have different statuses the one highest up the list is displayed as the order's status.
Colour	Choose the colour to be associated with this status in Dispatch Tracking and Customer Tree.

Quote → Order → Job Tracking → Dispatch Process

A typical order may go through these steps

Lead	Order	Job Tracking	Dispatch
Not Measured	Needs Processing	Unstarted	Unconfirmed
Follow up		Commenced	Confirmed
Won		Complete	Dispatched
			Complete
Once measured you can print or email Quote Documents		Once Processed you can print the Job Sheet or Supplier order.	

When Dispatch is completed you can go to Sales → Invoicing and Invoice everything for the day week month that has been Dispatch

A background image of a sunset or sunrise with a warm orange and yellow sky and white clouds along the horizon.

Thank you

Any further questions please contact us at
support@buzsoftware.com.au