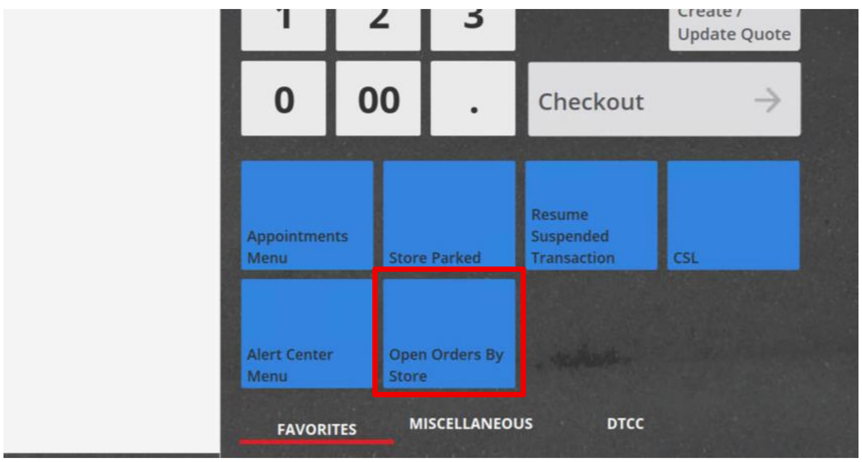
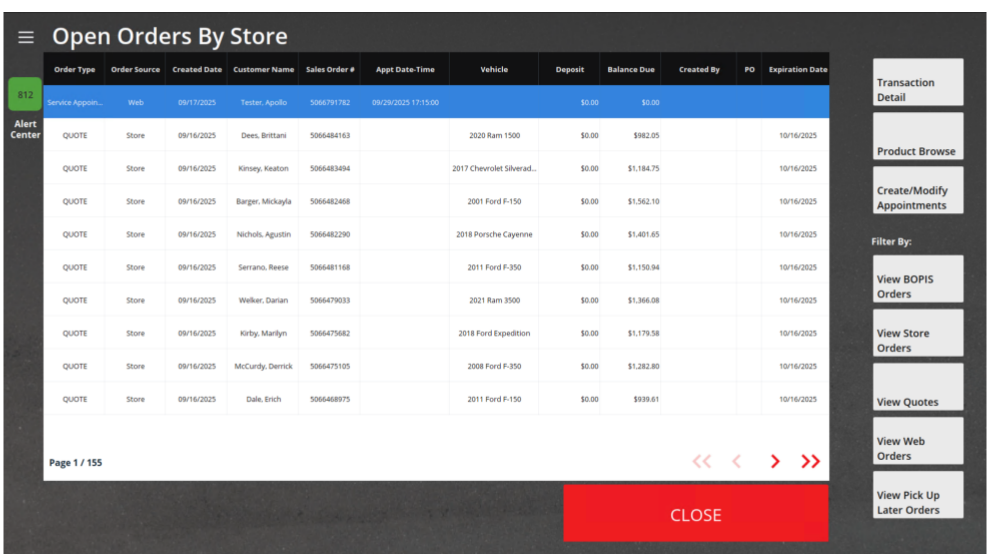
Vision POS – Managing Open Orders

Purpose and Overview

The Open Orders by Store page provides a quick look at every order and appointment coming into your store. You can use this area to view order details, adjust appointments, or checkout using Product Browse to add or remove products from existing orders.

This document is broken down into the following sections:

Accessing the Open Order Screen

Step	Action
1	From the main screen, click the **Open Orders By Store** button. 
2	This takes you directly to the ‘Open Orders By Store’ screen. 

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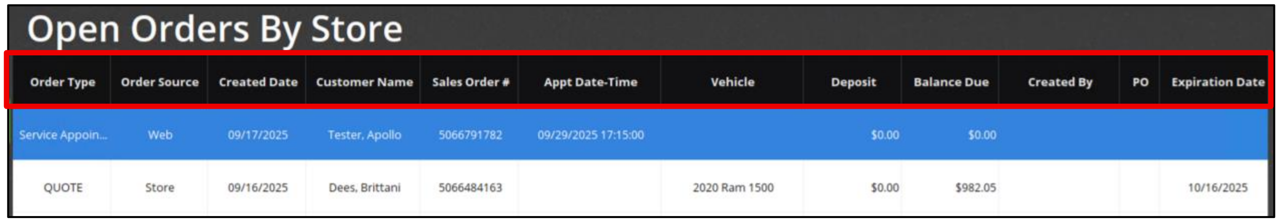
Toolbar

The toolbar provides a quick view of key order details.

Note: Each column of the toolbar can be clicked to access a filter to sort the results alphabetically.


Open Orders By Store

Order Type	Order Source	Created Date	Customer Name	Sales Order #	Appt Date-Time	Vehicle	Deposit	Balance Due	Created By	PO	Expiration Date
Service Appoin...	Web	09/17/2025	Tester, Apollo	5066791782	09/29/2025 17:15:00		$0.00	$0.00			
QUOTE	Store	09/16/2025	Dees, Brittani	5066484163		2020 Ram 1500	$0.00	$982.05			10/16/2025

Column Name	Description
Order Type	Specifies the type of order including: • QUOTE • ROPIS • Service Appointment • Store Order • BOPIS
Order Source	Indicates where the order originated including: • Web – Orders placed on Tires.com • CEC – Orders from the Customer Experience Center (formerly Discount Tire Direct) • T-Rack – Orders placed through Tire Rack • Store – Orders created in store
Created Date	The date the order was created.
Customer Name	The name of the customer the order belongs to.
Sales Order #	Indicates the Sales Order # for reference.
Appt Date-Time	Shows the appointment date and time if applicable.
Vehicle	Shows the vehicle entered when the order was created.
Deposit	Displays the amount of the deposit that was collected.
Balance Due	Shows the remaining balance the customer needs to pay when arriving at the store.
Created By	The name of the employee that created the order.
PO	Indicates if a Purchase Order has been created.
Expiration Date	This is the date the order will automatically cancel and be removed from the system.

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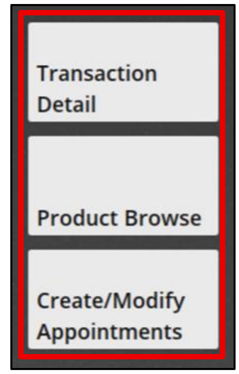
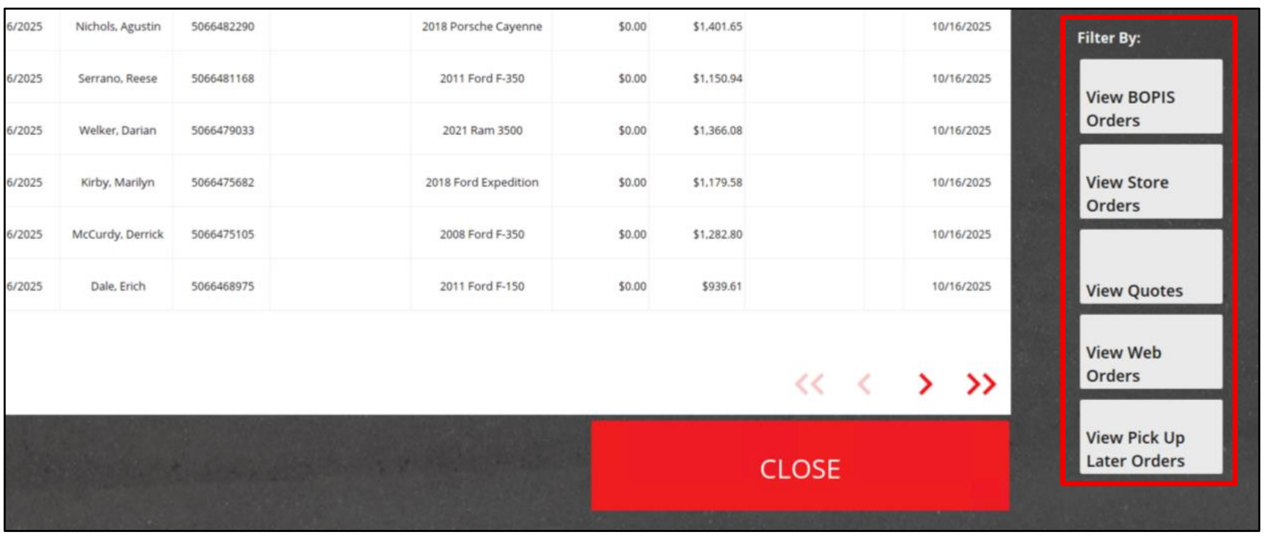
Action Buttons

Use the action buttons on the upper right-hand side of the screen to quickly access the following actions:

Button Name	Description	Image
Transaction Detail	View detailed order information.	
Product Browse	Add or remove products or services from an order.	
Create/Modify Appointments	Schedule or adjust an appointment for the order.	

Filters

The buttons below the Action Buttons allow you to quickly filter the Open Orders list by some of the most used parameters.



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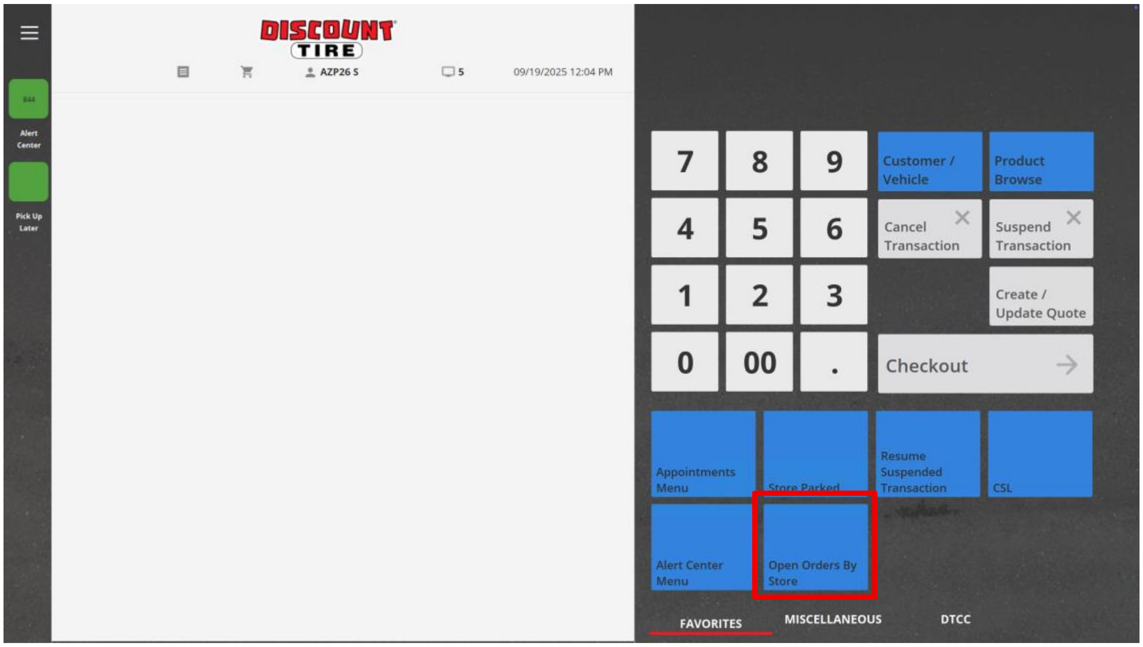
Deleting an Order

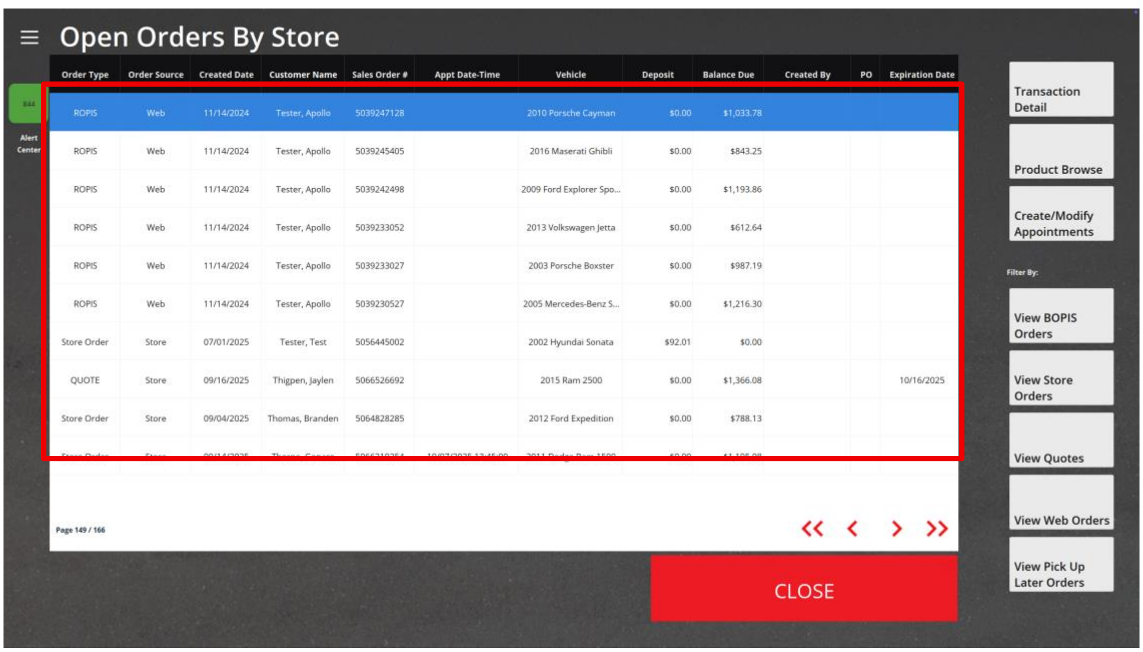
Complete the following steps to delete an order from a customer's account.

Note: Quotes cannot currently be deleted.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main screen, click the Open Orders By Store button.



</td></tr>
<tr><td>2</td><td>Select the sales order that needs to be deleted.



</td></tr>
</table>

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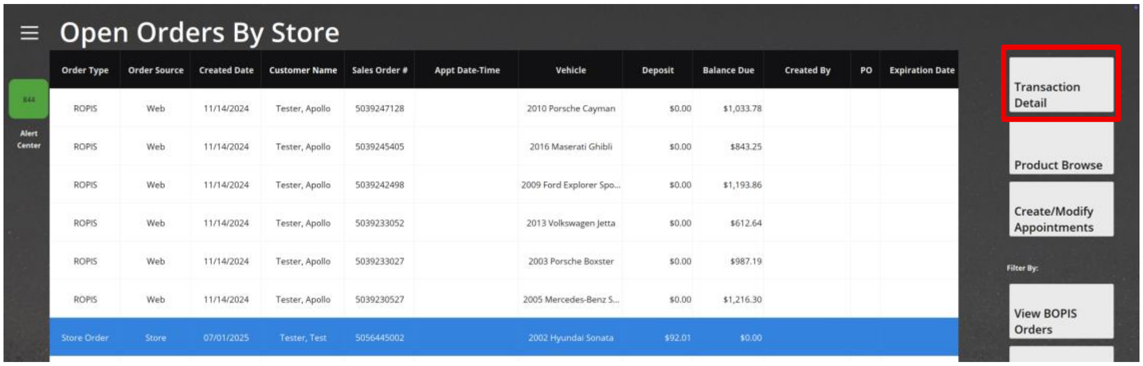
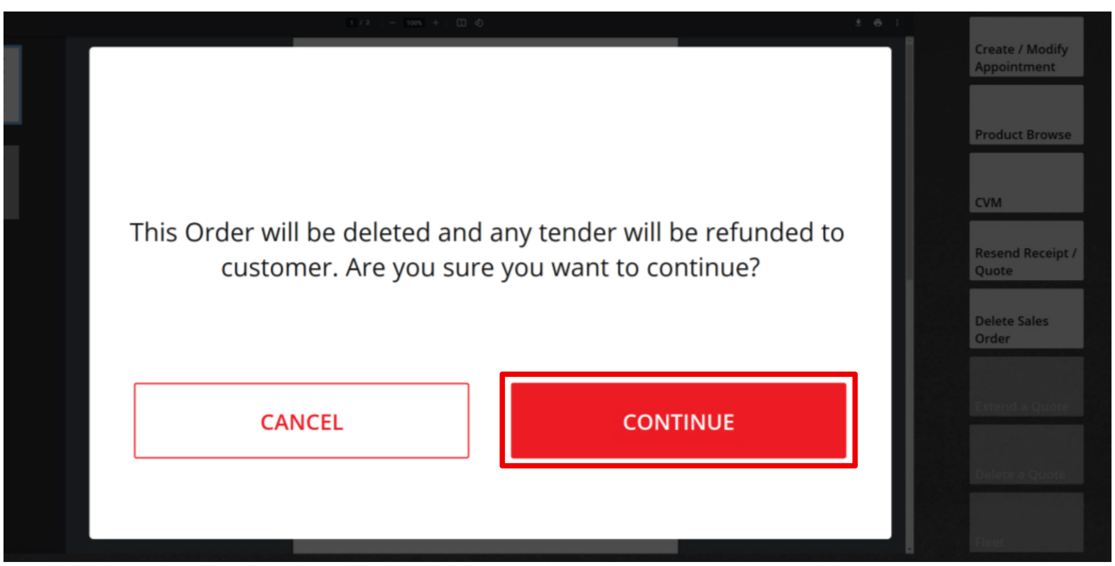
Step	Action
3	Click **Transaction Detail**. 
4	Click **Delete Sales Order**. 
5	A pop-up will display alerting the user that any tender will be refunded to the customer. Click **CONTINUE**. 

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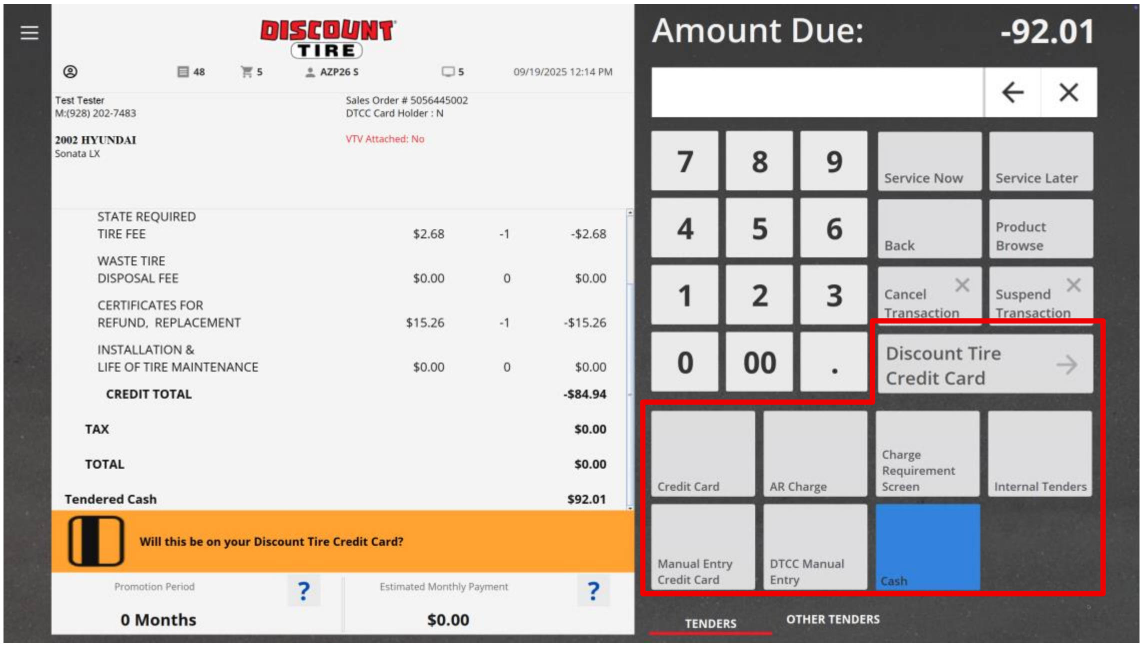
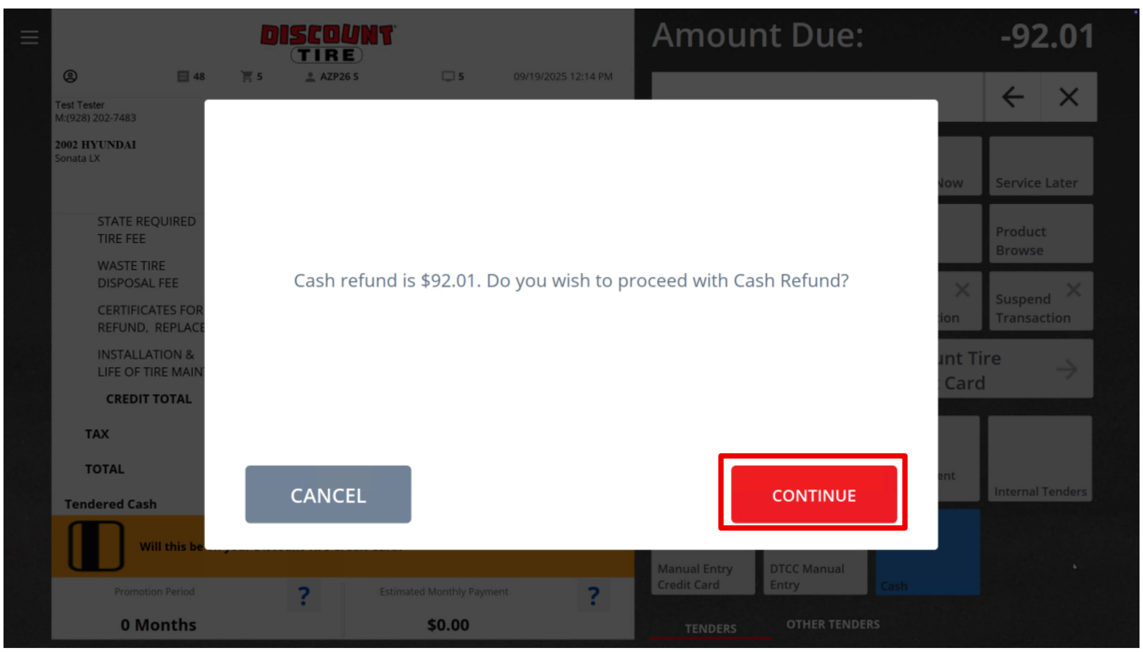
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Select the appropriate tender type.



</td></tr>
<tr><td>7</td><td>A pop-up will display alerting the user of the refund type and amount due to the customer.
Click CONTINUE.



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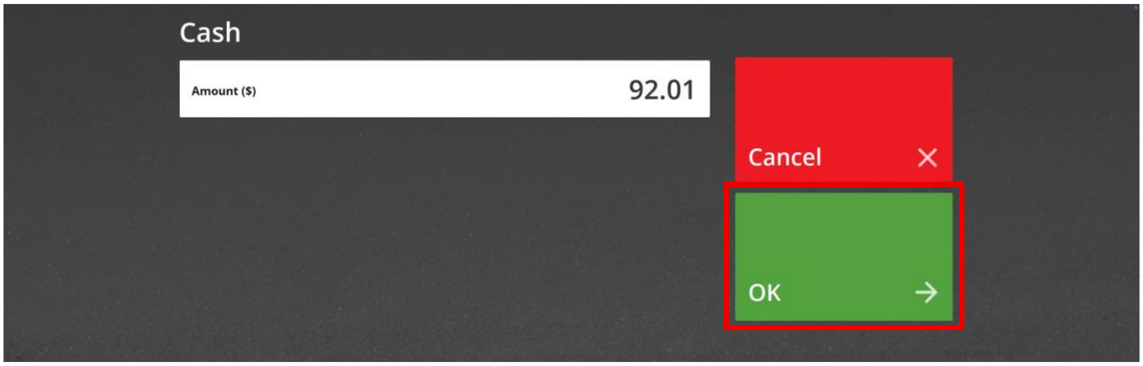
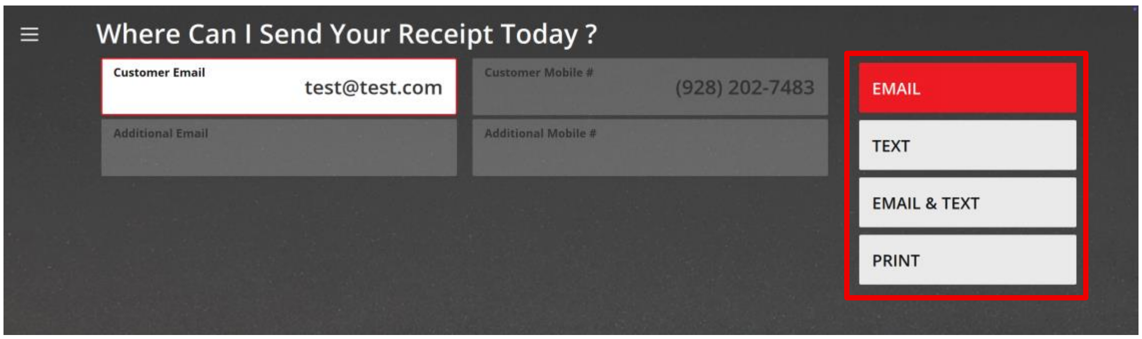
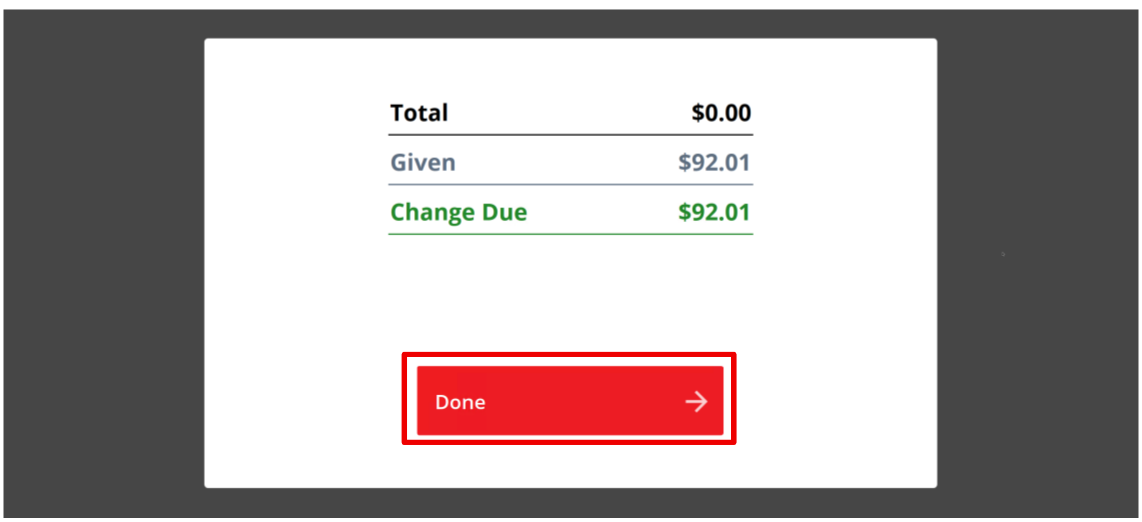
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Click OK.

</td></tr>
<tr><td>9</td><td>Select the method the customer wants to receive their receipt.

</td></tr>
<tr><td>10</td><td>Click Done.
Note: The order may still display under customer info until the system updates.

</td></tr>
</table>

Contact

If you have any questions, please contact your Buddy Store or your AVP.

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