Overview

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OVERVIEW functionality enables you to easily manage 2- or 4-document supply process and locate the documents related to one transaction: order, despatch advice, receiving advice or invoice.

All documents are organized into transactions. OVERVIEW gives you the list of transactions.
A transaction is initiated when an order is received, all the succeeding documents will be become part of the transaction based on the references given in the documents.

The OVERVIEW can further be filtered as follows:

- **Open transactions** – selected by default, lists all ongoing transactions that may need your attention - so-called desktop view.
- **Closed transactions** – list of those transactions that are marked by user as closed/completed.
- **All transactions** - both ongoing and closed transactions are displayed.

By default you see transactions from the last 7 days. You can choose more suitable time period from the drop-down list **Choose period**. The results will be shown shortly and the chosen period will be highlighted.
NB! If there are more than 20 transactions found, the list will be displayed on several pages.
NB! Notice that all documents are kept in Telema system and available for viewing in Telema Portal only for the archiving period agreed in the contract.

The following information is given about each transaction:

- **Transaction date** – the date when the first document (First activity) was received in Telema
- **First document** – number of the document that initiated the transaction (First activity)
- **First activity** – type of the document that initiated the transaction
- **Last document** – number of the document that was sent/received last
- **Last activity** – type of the document that was sent/received last
- **Delivery location** – name of the delivery location
- **Orderer** – name of the branch who ordered the goods (usually noted only in case it differs from Delivery location)
- **Transaction expiry date** – the date when the transaction info will be deleted from Telema system

A transaction is displayed with yellow background when the last document has not been received/viewed by the receiver yet.
For example, when you have received an order or receiving advice from your partner, the transaction will be displayed with yellow background until you open the document or mark it read/open manually in document view depending on user settings. Also, when sending a despatch advice or invoice the transaction might appear at first with yellow background until the receiver gets the document.

To **sort the transactions list** click on column headers. The second (double) click will sort it in descending order.

To **search required transactions** from the lists click on the button **Search**. A form with possible search criteria will be opened.

- To start searching enter the required search filters and click **SEARCH**. The results will be shown shortly. The total number of matching transactions will be given in the right-hand upper corner.
- To cancel the search click **CLOSE**. No search will be performed and the form will be closed.
- To reset the search criteria click **Reset**. All previously entered values will be erased and you can choose new search criteria.

To **view the documents that are related to the transaction** open the transaction details from the arrow that appears in front of each transaction.

The following information is given about each document:

- **Document no** - document number
- **Document type**
- **Delivery location** - name of the delivery location
- **Orderer** - name of the branch who ordered the goods (usually noted only in case it differs from Delivery location)
- **Amount** - total sum of the invoice (without VAT)
- **Received** - date and time (dd.mm. hh:mm) when the document was received in Telema
- **Forwarded** - date and time (dd:mm hh:mm) when the document was forwarded to the receiver
- **Rows** - number of product rows in the document
- **Expiry date** - the date when the document content will be deleted from Telema system
- Created by - name of the user who created the document

To **open the document** click on its Document no. A detailed document view will be opened.

If the Document no is not clickable, you probably do not have rights to view this type of document or the document has already expired, meaning the document content has been deleted. NB! The documents are accessible and viewable in Telema Portal only during the archiving period agreed in the contract.

To **print or save the document** click on "Printer" icon in the end of each row. The document will be opened in .pdf format for further printing or saving.

To **mark the transaction as closed/complete to remove it from your desktop (Open transactions)** click on Lock icon in front of the transaction.
When closing a transaction it will be displayed in Closed transactions list for all users that represent the same branch.
Tip! This feature let's you easily hide the orders that won't be processed any further. It is also wise to mark a transaction as closed/complete when it has actually ended to clean up your desktop.

Already closed transactions can be reopened at any time from the same Lock icon.
A transaction will also be reopened automatically by the system when a new document is received/sent (new Last activity is recorded). In this case the transaction will be reopened for every party and user.