

# **SALES**

## **ORDERS - ADD SALES ORDER**

You will encounter a **Customer** and a **Billing Customer** on both the Sales Order and the Sales Invoice.

**Customer** (Main Customer) - is the client who is ordering the parts / services.

**Billing Customer** - is the client / finance party who will be paying for the parts / services.

Ribbon Access: Sales > Orders



- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where you need to create an order.
  - The example has *Durban* selected.
- 3. An Order can be Created from any *Status*.
  - The example has *New Order* selected.
- 4. Click on Add.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Add*.



### Orders - Add Sales Order

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	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR.	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		

5. The Add new Customer Order screen will be displayed.

#### SALES ORDER HEADER

- 6. Customer Name: Click on the *search* button to select the customer.
  - i. The *Select a customer for this Order* screen will display.
  - ii. Select the **row** of the customer you are placing the order for.
  - iii. Click on OK.



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7. When you receive the *Billing Customer* message to confirm;

#### • Is the billing customer the same as the main customer?

- The <u>Main</u> Customer refers to where the items are being shipped.
- The <u>Billing</u> Customer refers to the Account Holder who will pay for the goods/services.
- 8. Click **Yes** if the Billing Customer is the same as the Main Customer or
- 9. Click *No* if the Billing Customer is different to the Main Customer.



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- **Contact Name:** Click on the **search button** to select the contact name using the steps as explained above.
- **Commercial:** This is the default **commercial**<sup>1</sup> configured for the customer. A different commercial can be selected by clicking on the down *arrow*, if required.
- Salesman: This field will auto populate with the person currently logged in to the system. Click on the down **arrow** to select an alternative salesman from the list, if required.
- **Billing Customer:** This field will already be populated if the Customer is the same as and Billing Customer. If not, click on the **search button** to select the customer who will be paying for this invoice.
- **Reference:** Type in a reference for the sales order.
- Status: The status field will display [N] for New by default.

<sup>1</sup>Commercial is the mark up structure for the item. The original price of the item, including the company profit margin



- Order Date and Time: The current date and time that the order has been placed, will display.
  - The date can be changed by clicking on the down arrow to change the date using the Calendar function, if required.
  - Click on the **arrow indicators** to adjust the time, if required.
- **Billing Contact:** Click on the **search button** to select the billing contact, following the steps for adding a Customer Name.

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#### **FINANCIAL HEADER**

- Order Currency: This field will populate based on the currency set up for the customer. Use the drop-down **arrow** to select an alternative currency from the drop-down menu, if required.
- **Tax Rate:** This field will populate based on the currency set up for the customer and can not be changed on this screen.



• Exchange Rate: This field will populate based on the exchange rate set up in the system. Type in or use the *arrow indicators* to adjust the exchange rate, if required.

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#### **ADDRESSES TAB**

- Billing Address<sup>1</sup>: The billing address need to be added to the customer before linking the order. Click on the *search* button to select the billing address.
- Shipping Address<sup>2</sup>: This field needs to be completed. If the Shipping Address field has not populated, click on the *search* button to select the address where the goods can be shipped to.

<sup>2</sup>A shipping address is the address where an order will be sent.

<sup>&</sup>lt;sup>1</sup>A Billing address is where the invoice for an order will be sent, whether it is a business-to-business (commercial) order or consumer order. You must define a billing address for any order.



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#### **RELATED REFERENCES TAB**

- 10. Click on the *Related References* tab.
  - The sales order that you are creating, may be linked to one or more of the following reference types:
    - Serial No
    - Call Reference
    - Contract No
    - Location
    - Project Reference
    - Quote Reference
    - Work Order Reference

#### Note on using the Reference No's:

You can select a *Reference Type* and *Reference No* <u>before</u> you select a customer for all types, except the *Call*



*Reference Type* which requests that a customer is selected first.

- With the other Types, when the *Reference Type* and *No* are selected, the linked *customer details* will populate the *Customer* and *Financial* heading fields.
- When the *Reference Type* and *No* are selected, other Reference No's linked to the initially selected number can also populate other Reference fields.

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- 11. Click in the *Reference No* field of the Reference Type you wish to link to this order.
  - The example has *Serial No* selected.



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- 12. An *ellipsis* button will be available at the end of the field.
  - Use the scroll bar to scroll to the left or right of the screen to display information that may be hidden.
- 13. Click on the ellipsis button to display the *Select the related equipment for this order* screen.

The 'Select...[]' screen that displays will directly correspond to the *Reference Type* that has been selected. For example, if the <u>Contract</u> No Type is selected, then the 'Select the related <u>contract</u> for this order' screen will display.

- 14. Click on the **row** of the item that you wish to link to this sales order.
- 15. Click on *OK*.



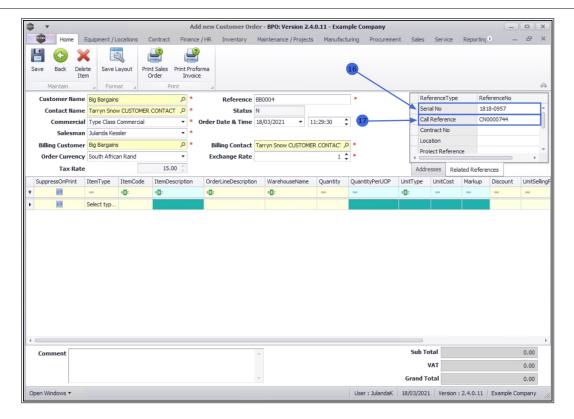
#### Orders - Add Sales Order

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- 16. The selected *Serial No* will populate the *Related References* frame.
- 17. The example also has a *Call Reference* linked to the selected serialised item as the Customer request was made from a Call.

There can be <u>different</u> variations of this e.g. a selected *Order No* can have a *Work Order* or *Project Reference* linked to it.





#### **ADD SALES ORDER ITEMS**

- Click on the Select type... text box below *Item Type* to display the down *arrow*.
- 2. Clicking on the **arrow** will display the *Item Type* drop-down list.
- 3. From the list, select <u>one</u> of the following:
  - CRFT Labour craft, i.e. Technician
  - CTRT Sub Contracts / Third Party Labour/Service
  - EXPS Expenses
  - INVN Parts
  - SERV Internal Labour/Service
  - TRVL Travel
  - WARR Warranty



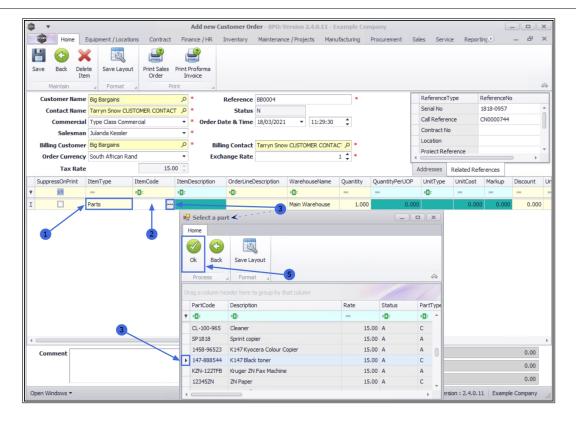
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- 1. The example has *Parts* as the Item Type selected.
- 2. Click in the *Item Code* text box to display the *ellipsis* button.
- 3. Clicking on this button will display the *Select a*[] screen.

The *Select a* [] screen will always correspond with the *Item Type* initially selected e.g. if <u>Labour</u> was initially selected then the *Select a <u>craft</u>* screen will display.

- 4. Click on the *row* of the *Part* you wish to select.
- 5. Click on OK.





## Edit the Quantity, Discount and Unit Selling Price

- 6. To adjust the *Quantity*, *Discount* and *Unit Selling Price*, click in the required field and type in or use the directional *arrows* to select the required value.
- Suppress on Print check box: The check box must only be selected for the line items that you do not want printed on the Sales Invoice.

The *Sub/Grand Total* will not be affected, but the visible selling prices will not match up with the invoice totals.



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ф т				Add new Custo	mer Order -	BPO: Version 2.	.4.0.11	- Examp	le Company					-	
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- 8. Use the scroll bar to scroll across the screen to view the *Department* column.
- If the department was not populated then add a Department by clicking on the *ellipsis* button to select the Department for this item.

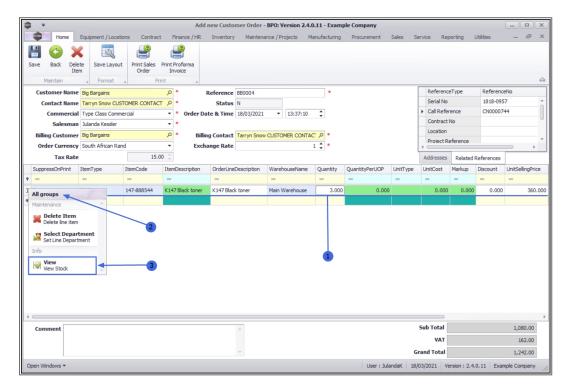
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Order Currency: South African Rand <ul> <li>Exchange Rate</li> <li>1;:0°</li> </ul> Addessession: Related References: <ul> <li>Item:Cost Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li> <li>Item:</li></ul>	1	Billing Custon	er Big Bargains	م	* Billing Cont	act Tarryr	n Snow CUSTOME	R CONTACT 🔎	•							
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#### View Stock

When creating an Order, the salesman is able to check the *stock quantities* of items that he wishes to include in the Order. This enables him to manage the customer's expectations. For example, if there is short stock of a particular item, the customer can be informed that there may be a delay in delivery or that there is an alternative substitute item available, which the customer may prefer to ensure that an order is received timeously.

- 1. *Right click* anywhere in the *row* of the item that you wish to view the stock quantity of.
- 2. The *All groups* drop-down menu will display.
- 3. Select View View Stock



- 4. The *Current Stock* data grid will be displayed.
- 5. Each row represents a *warehouse* that contains stock of the item.



- 6. Scroll across the data grid, if necessary, until you can view the stock *quantities* e.g. Current Stock or Net Stock, in each warehouse.
- This list now also returns alternate parts in stock : Version Compatibility<sup>1</sup>
- 8. Click on *Close* or anywhere outside the Current Stock data grid to close the window.

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#### Add additional line items

On the next available line, click in the text box of the *Item Type* column *below* the item you have just added. Refer to" Add Sales Order Items" on page 11 for details on how to complete the line item.

1 BPO2 v2.4.0.11 or higher



Click <u>only</u> on the *Suppress on Print* column check boxes of the items that you do *not* want visible on the printed Sales Invoice. This will not affect the *Sub/Grand Total* but the selling prices that are visible will not match up with the invoice totals.

#### **ADD COMMENTS**

9. Click inside the Comments text box to type a comment relating to this order.

#### SAVE THE SALES ORDER

10. When you have finished editing the new customer sales order, click on *Save*.

+			Add	new Customer Order -	BPO: Version 2.4.0	).11 - Examp	ole Company						
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11. The *Sales Orders* listing screen will be updated with the new sales order you have created.



φ	*				Sales Orders - B	PO: Version 2.4.	0.11 - Exa	mple Compa	ny					X
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	OR:0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Banca Surend	1.00	15.00	04:58:22		
	OR:0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR:0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR:0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
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	CR.0000303	P0N0001	Pirk Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pilay	1.00	15.00	16:35:25		
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	CR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pilay	10.00	0.00	11:59:51		
	CR.0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repoold	1.00	15.00	12:38:44		
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	OR0000315	BOT0001	Bothas Networking inc	New order		45.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
	OR:0000316	8060001	Big Bargains	New order	860004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	12:40:19		
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#### **Related Topics**

- Edit / Delete / View a Sales Order
- Print / Email a Sales Order
- Print Pro-Forma Invoice
- Create Sales Invoice from Sales Order
- <u>Create New Deal Sale / Rental (creates a call)</u>
- <u>Create New Deal Project Sale / Rental</u>

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