

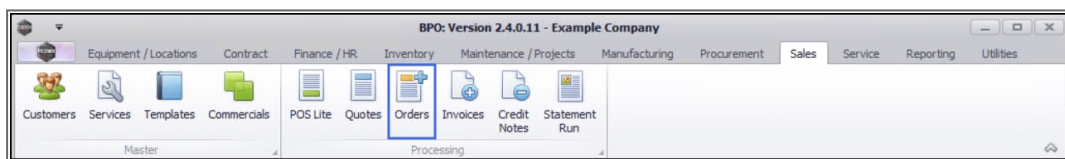
SALES

INTRODUCTION TO ORDERS

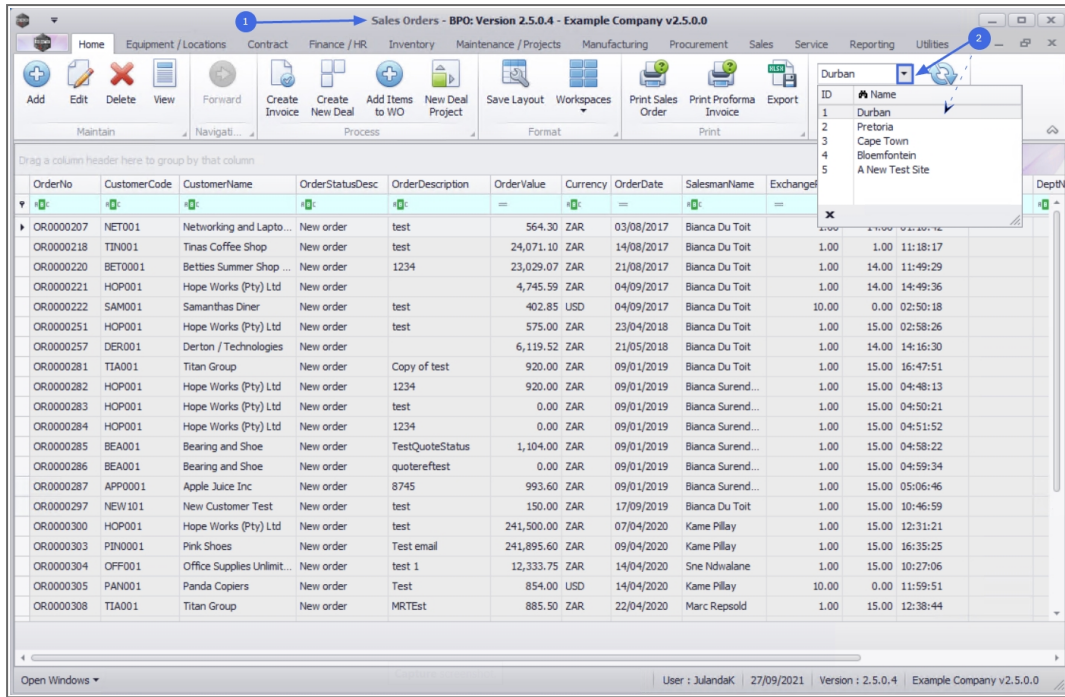
A Sales Order is an internal document that specifies the details about the product or services ordered by a customer. Information such as: price, quantity, buyer details, shipping address, billing address, terms and conditions and mode of payment is included on the Sales Order.

- You can convert a [Sales Quote](#) into a Sales Order.
- You can create a Sales Order directly without raising a Quote.

Ribbon Access: *Sales > Orders*

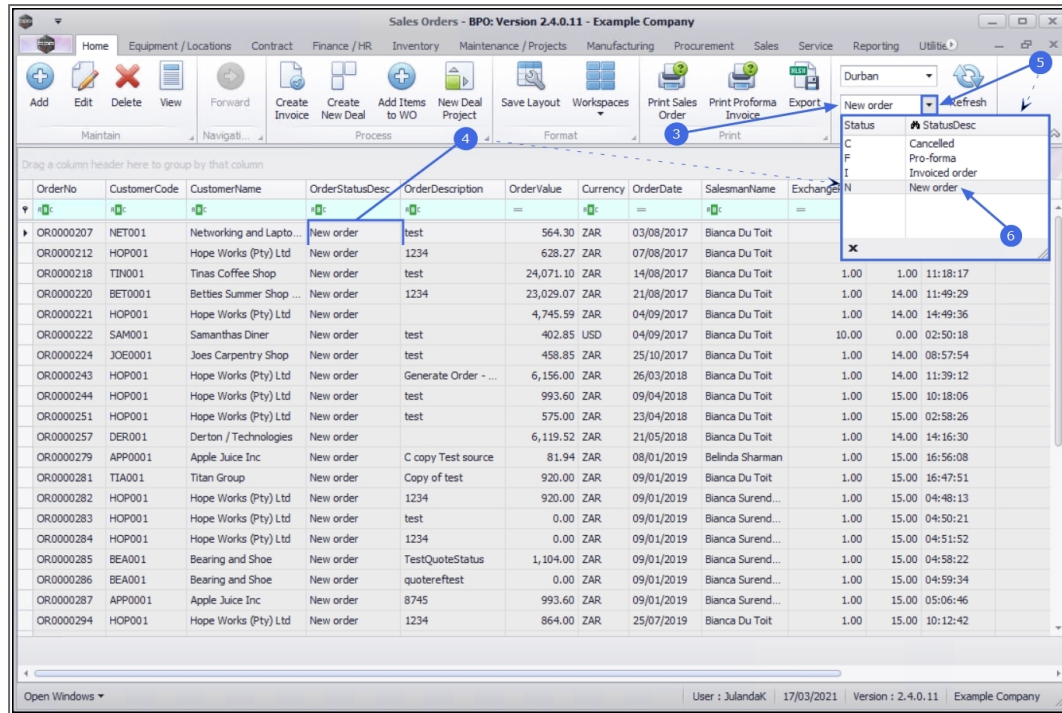


1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where the order can be located.
 - The example has **Durban** selected.



SELECT THE STATUS

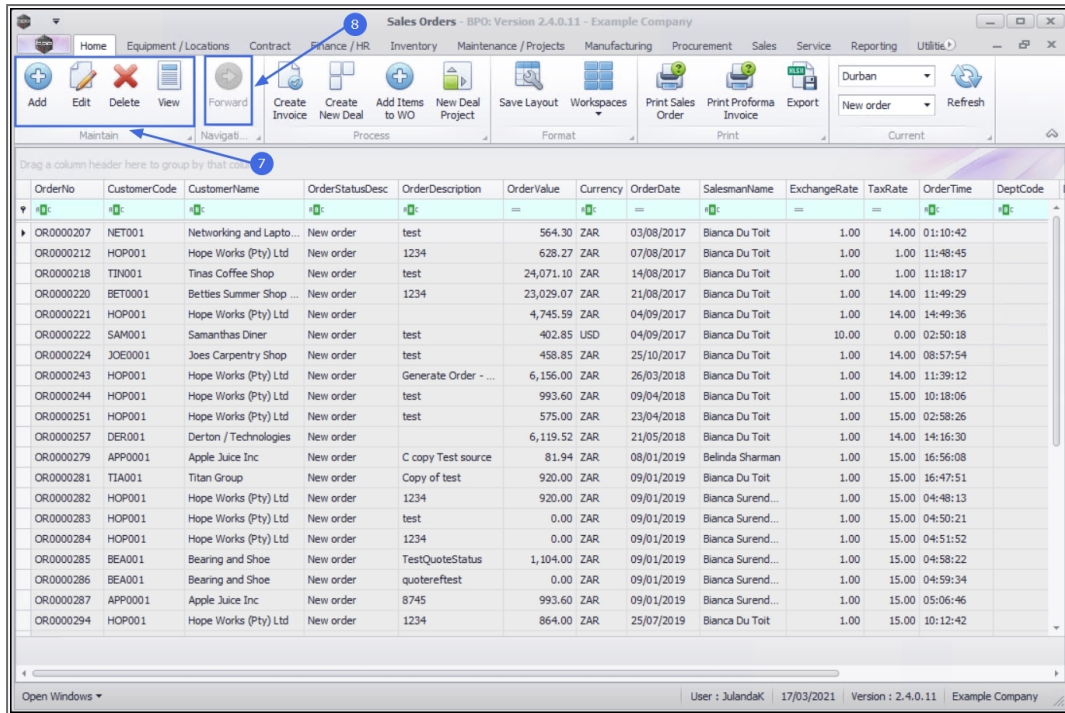
- This screen will open in the **New order** status by default.
- The Sales Orders listed in the data grid, will be filtered using the Site and Status you have selected.
- Sales **Quote Status** to change the Status, click on the down **arrow** to display the drop-down list:
 - Cancelled
 - Pro-forma
 - Invoiced order
 - New Order
- Select the Status you require.



THE RIBBON ACTION BUTTONS

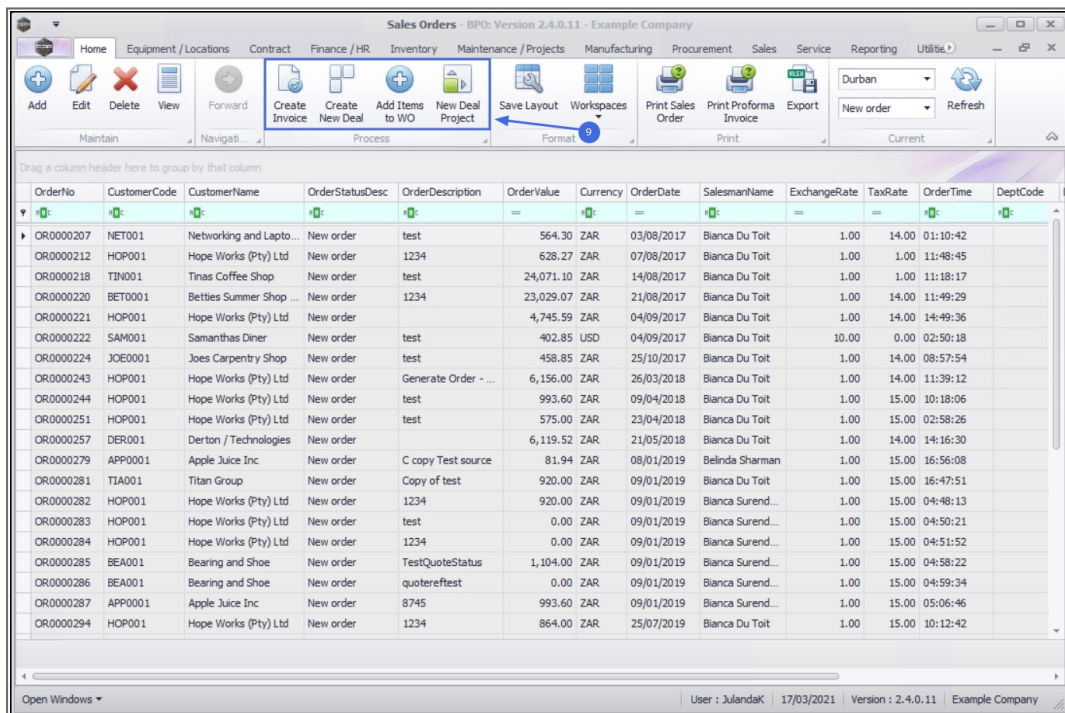
The Sales Orders ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

7. From this screen you can **Add, Edit, Delete or View a Sales Order**
8. Note that the **Forward** navigation button is greyed out. This feature is only available in the **Printed Status**.



OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode
OR0000207	NET001	Networking and Lapto...	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42	
OR0000212	HOP001	Hope Works (Pty) Ltd	New order	1234	628.27	ZAR	07/08/2017	Bianca Du Toit	1.00	1.00	11:48:45	
OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Bianca Du Toit	1.00	1.00	11:18:17	
OR0000220	BET0001	Betties Summer Shop ...	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29	
OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36	
OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18	
OR0000224	JOE0001	Joes Carpentry Shop	New order	test	458.85	ZAR	25/10/2017	Bianca Du Toit	1.00	14.00	08:57:54	
OR0000243	HOP001	Hope Works (Pty) Ltd	New order	Generate Order - ...	6,156.00	ZAR	26/03/2018	Bianca Du Toit	1.00	14.00	11:39:12	
OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60	ZAR	09/04/2018	Bianca Du Toit	1.00	15.00	10:18:06	
OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26	
OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30	
OR0000279	APP0001	Apple Juice Inc	New order	C copy Test source	81.94	ZAR	08/01/2019	Belinda Sharman	1.00	15.00	16:56:08	
OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51	
OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:48:13	
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:50:21	
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:51:52	
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:58:22	
OR0000286	BEA001	Bearing and Shoe	New order	quotereffest	0.00	ZAR	09/01/2019	Bianca Surend...	1.00	15.00	04:59:34	
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	

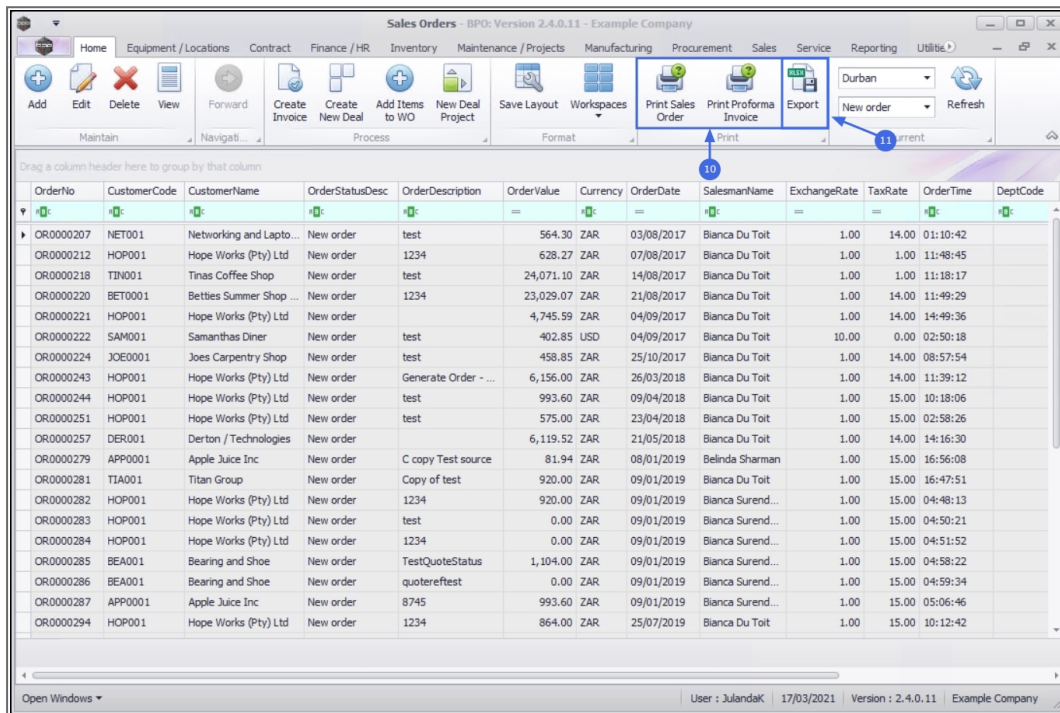
9. From this screen you can also Create Invoice, Create New Deal, Add Items to Work Order or create a New Deal Project.



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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	

PRINT OPTIONS

10. You can [Print Sales Order](#) or [Print Proforma Invoice](#).
11. The Export feature allows you to export a list of the Sales Orders in the current Status to a Microsoft Excel Spreadsheet where it can be printed.



Related Topics

- [Add a Sales Order](#)
- [Edit / Delete / View a Sales Order](#)
- [Print / Email a Sales Order](#)
- [Print Pro-Forma Invoice](#)
- [Create Sales Invoice from Sales Order](#)
- [Create New Deal Sale / Rental \(creates a call\)](#)
- [Create New Deal Project Sale / Rental](#)

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