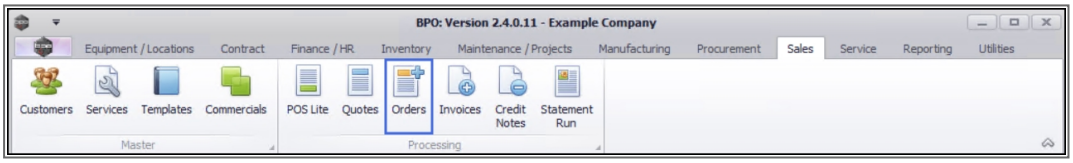
SALES

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.

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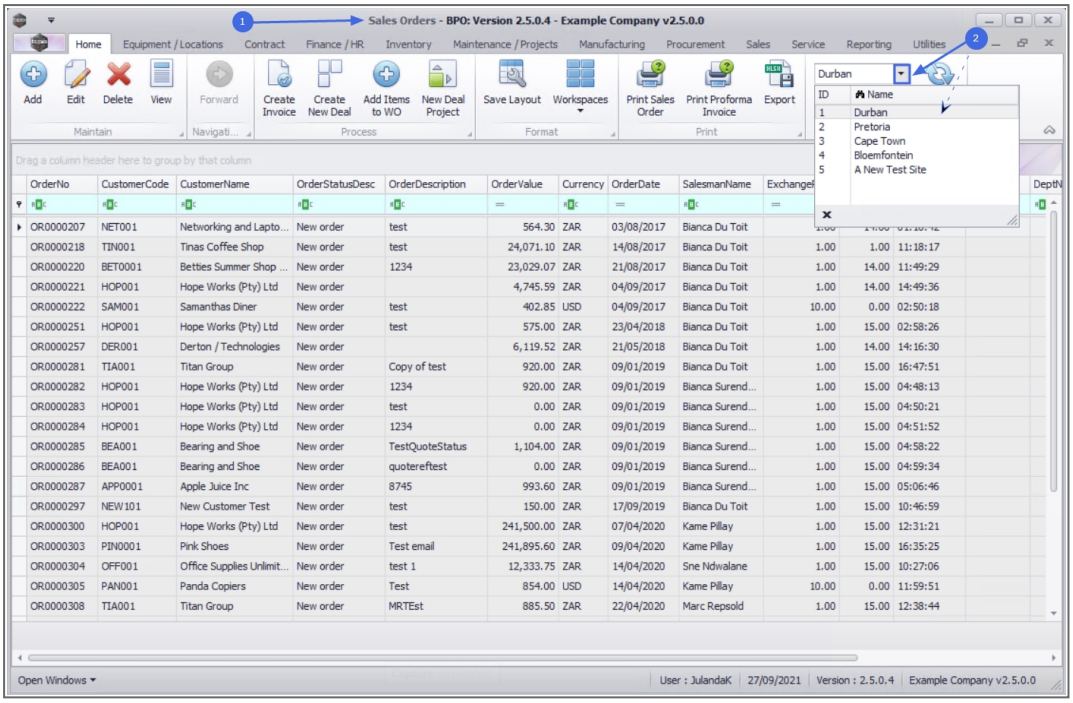

SELECT THE STATUS

3. This screen will open in the ***New order*** status by default.
4. The Sales Orders listed in the data grid, will be filtered using the Site and Status you have selected.
5. 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
6. Select the Status you require.

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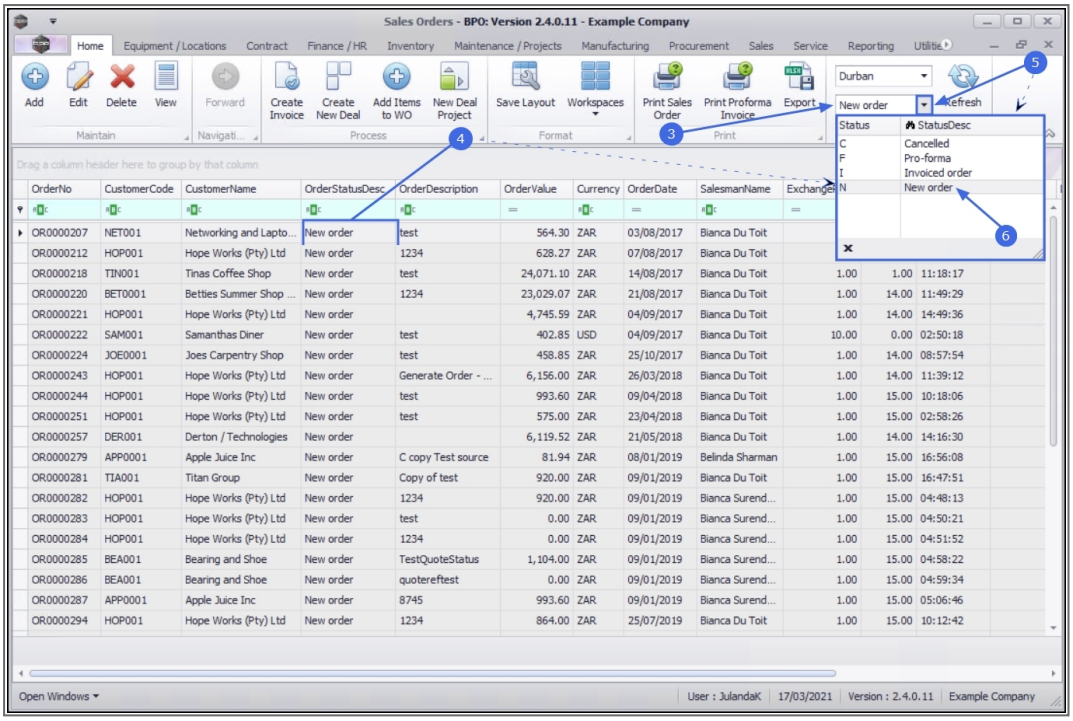

THE RIBBON ACTION BUTTONS

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**.

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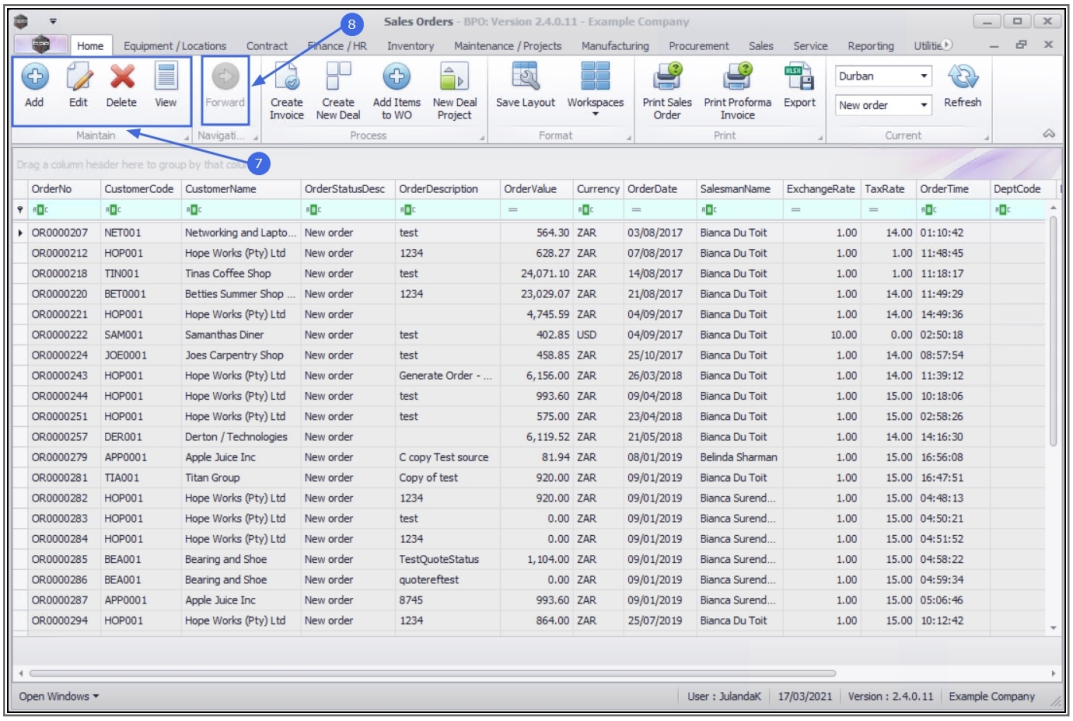
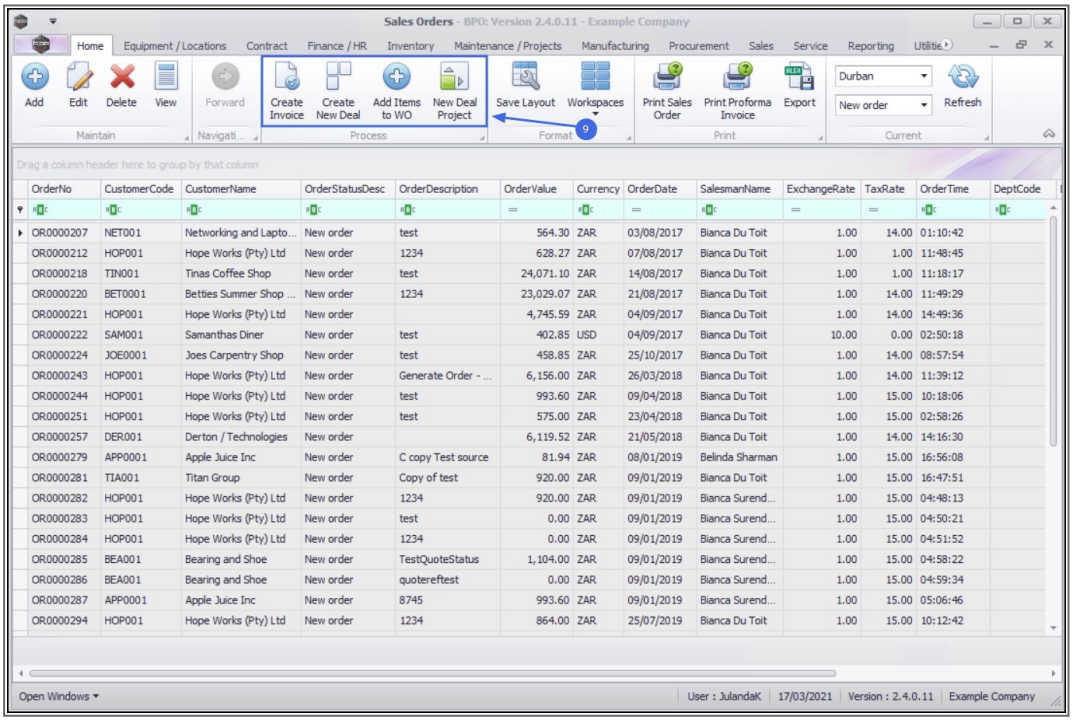


9. From this screen you can also Create Invoice, Create New Deal, Add Items to Work Order or create a New Deal Project.



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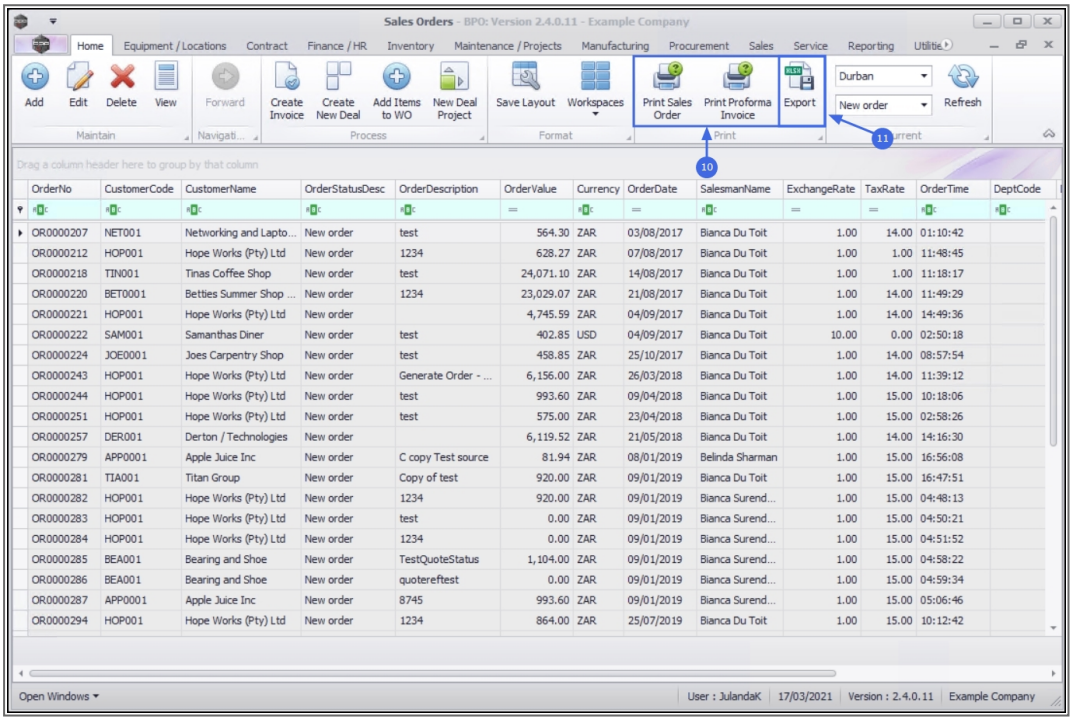
PRINT OPTIONS

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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