

SALES

ORDERS – ADD SALES ORDER

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

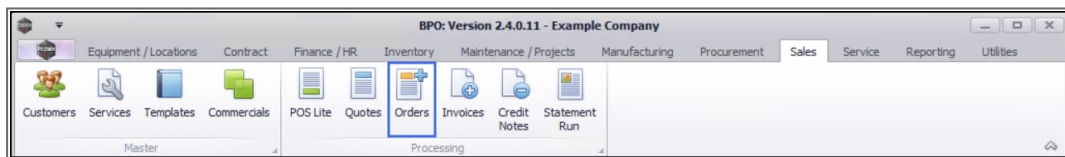


Customer (Main Customer) - is the client who is ordering the parts / services.



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

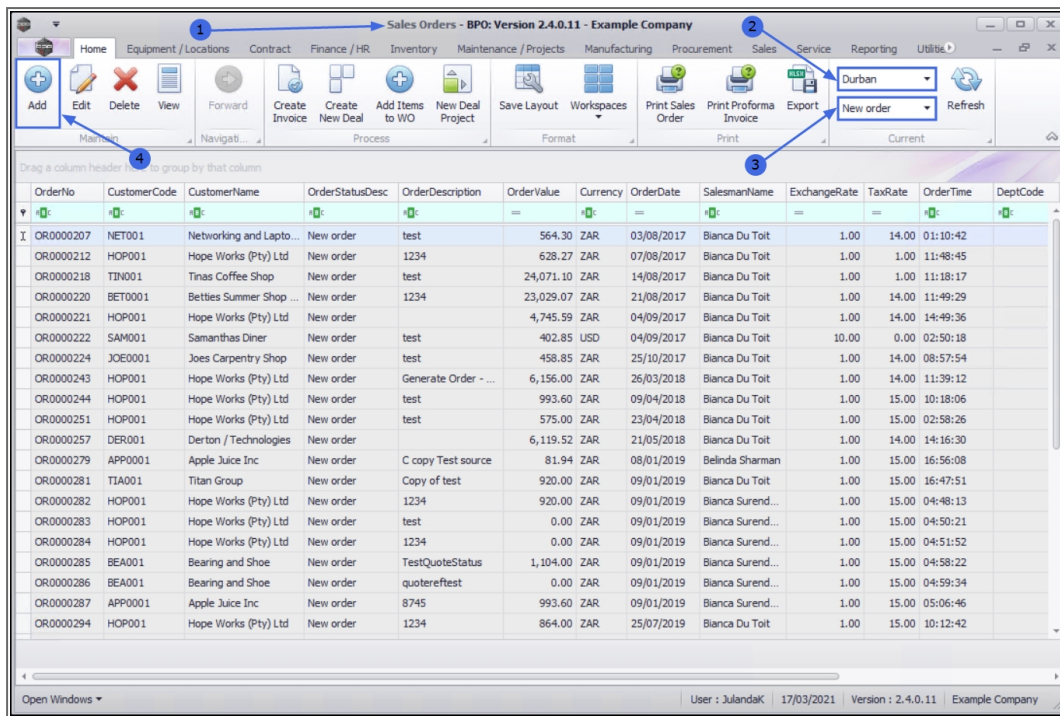
Ribbon Access: Sales > Orders



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**.



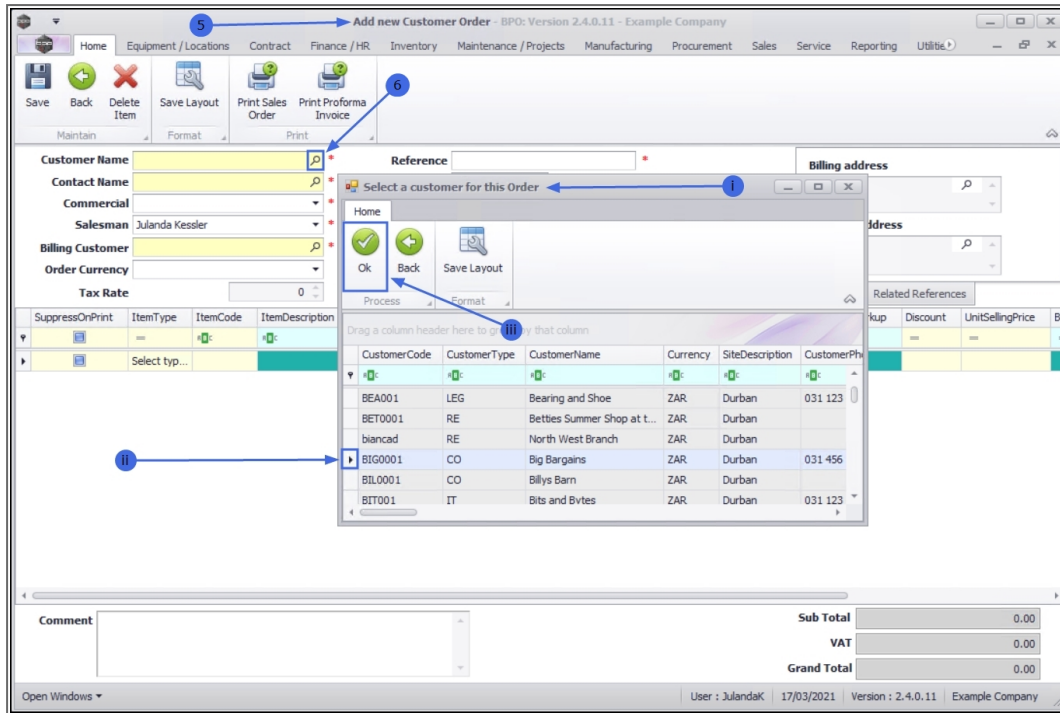
Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



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**.



Customer Name: [Search Icon]

Contact Name: [Search Icon]

Commercial: [Dropdown]

Salesman: Julanda Kessler

Billing Customer: [Search Icon]

Order Currency: [Dropdown]

Tax Rate: 0

Reference: [Search Icon]

Select a customer for this Order

CustomerCode	CustomerType	CustomerName	Currency	SiteDescription	CustomerPhone
BEA001	LEG	Bearing and Shoe	ZAR	Durban	031 123
BET0001	RE	Betties Summer Shop at t...	ZAR	Durban	
biancad	RE	North West Branch	ZAR	Durban	
BIG0001	CO	Big Bargains	ZAR	Durban	031 456
BIL0001	CO	Billys Barn	ZAR	Durban	
BIT001	IT	Bits and Bvtes	ZAR	Durban	031 123

Comment: [Text Area]

Sub Total: 0.00

VAT: 0.00

Grand Total: 0.00

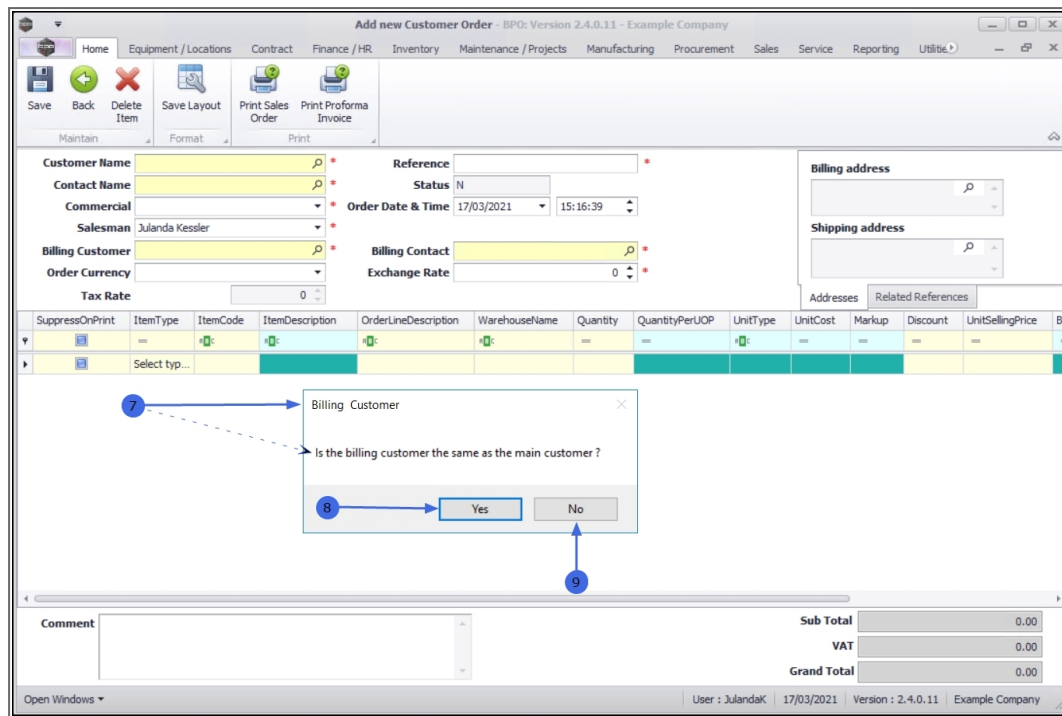
User: JulandaK 17/03/2021 Version: 2.4.0.11 Example Company

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

- **Is the billing customer the same as the main customer?**
 - The Main Customer refers to where the items are being shipped.
 - The Billing 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

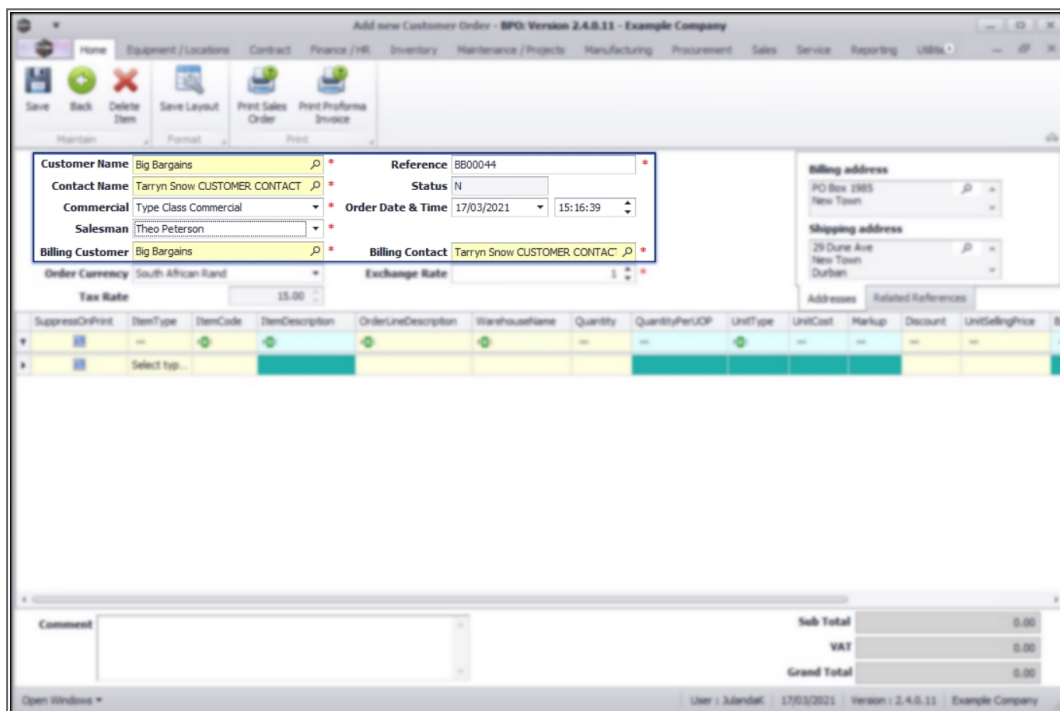
9. Click **No** if the Billing Customer is different to the Main Customer.



- **Contact Name:** Click on the **search button** to select the contact name using the steps as explained above.
- **Commercial:** This is the default **commercial**¹ 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.

¹Commercial 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.

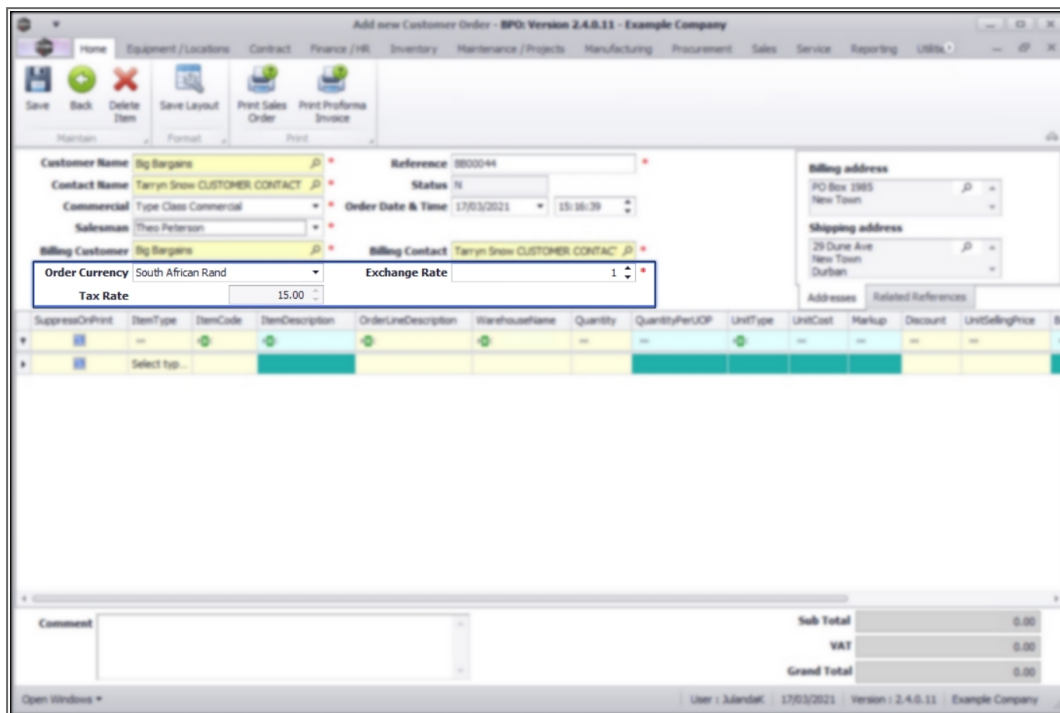


The screenshot displays the 'Add new Customer Order' interface. The top menu bar includes options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Save, Back, Delete Item, Save Layout, Print Sales Order, and Print Proforma Invoice. The main form area contains several sections: Customer details (Name, Contact, Commercial, Salesman, Billing Customer), Order details (Reference, Status, Order Date & Time, Billing Contact), Financials (Order Currency, Tax Rate, Exchange Rate), and Addresses (Billing and Shipping). A table for items is visible below the addresses, with columns for Suppress/OnPrint, ItemType, ItemCode, ItemDescription, OrderLineDescription, WarehouseName, Quantity, QuantityPerUOP, UnitType, UnitCost, Markup, Discount, and UnitSellingPrice. At the bottom, there is a Comment field and a summary section showing Sub Total, VAT, and Grand Total, all currently at 0.00. The status bar at the very bottom indicates the user is 'Julendak', the date is '17/03/2021', and the version is '2.4.8.11'.

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.

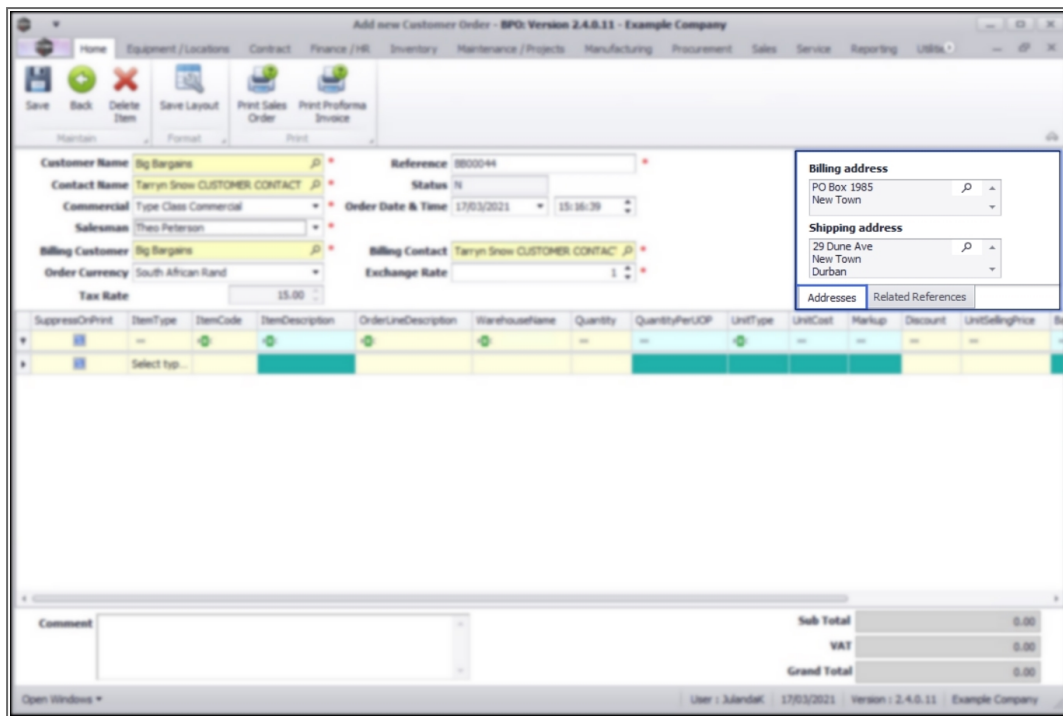


ADDRESSES TAB

- **Billing Address¹:** 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 Address²:** 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.

¹A 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.

²A shipping address is the address where an order will be sent.



RELATED REFERENCES TAB

10. Click on the ***Related References*** tab.

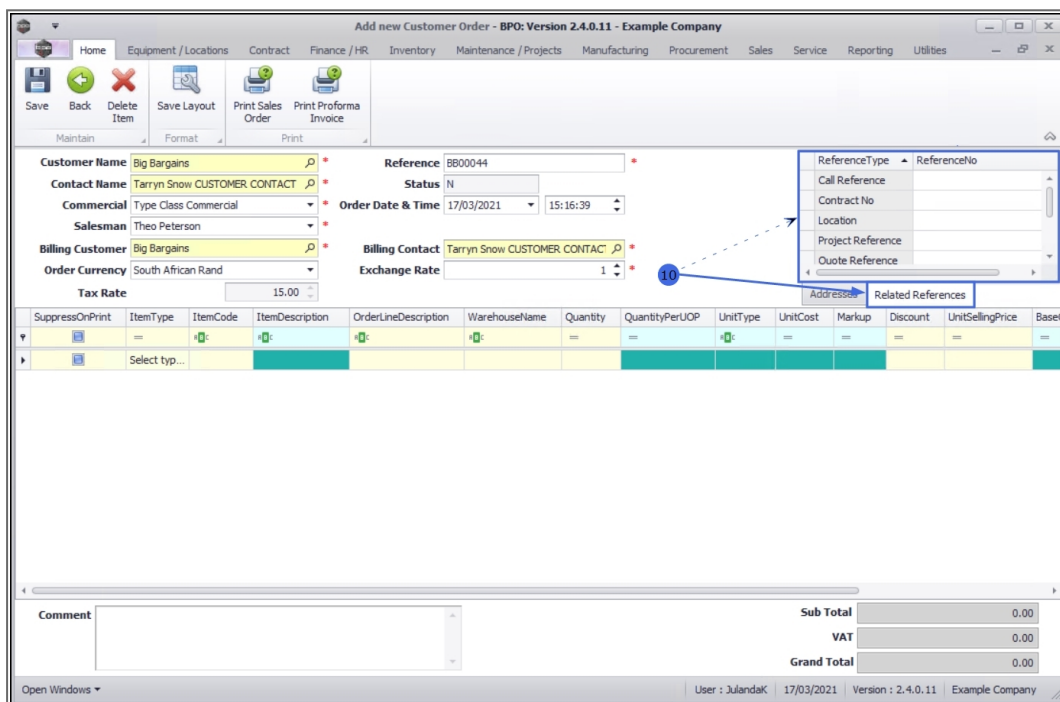
- The sales order that you are creating, may be linked to one or more of the following reference types:
 - Serial No
 - Call Reference
 - Contract No
 - Location
 - Project Reference
 - Quote Reference
 - Work Order Reference

Note on using the Reference No's:

- You can select a *Reference Type* and *Reference No* before 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.



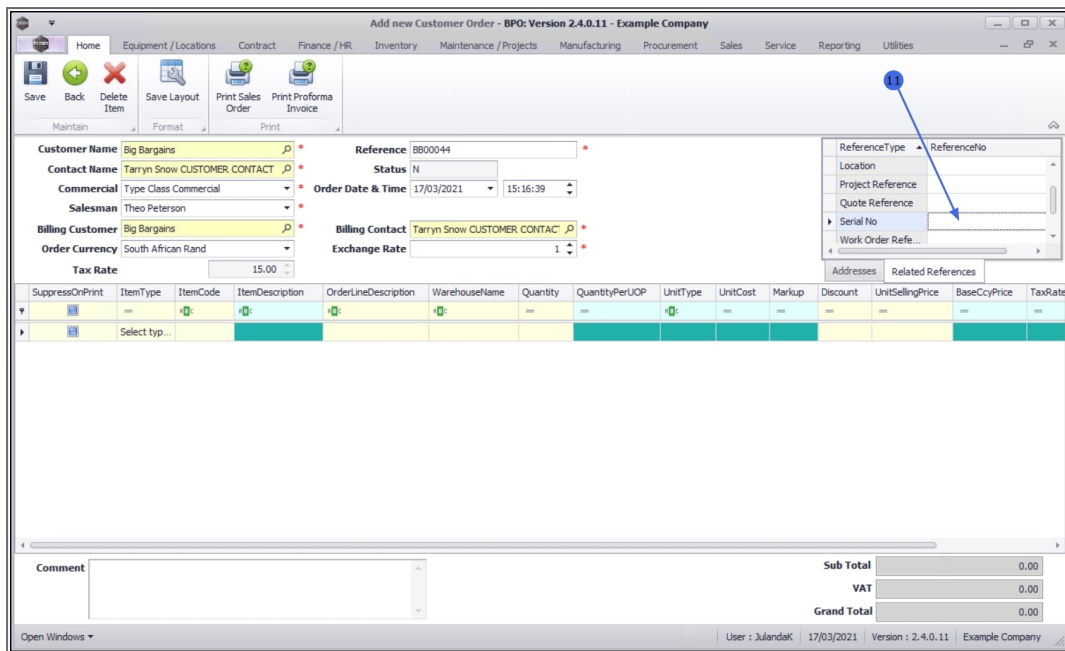
The screenshot shows the 'Add new Customer Order' window. The 'Reference' field is set to 'BB00044'. The 'Status' is 'N'. The 'Order Date & Time' is '17/03/2021 15:16:39'. The 'Billing Contact' is 'Tarryn Snow CUSTOMER CONTACT'. The 'Exchange Rate' is '1'. A blue circle highlights the 'Reference No' field, and a blue arrow points to it from the number '11' in the text below. A dropdown menu is open, showing 'ReferenceType' and 'ReferenceNo' options.

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseC
	Select typ...												

Sub Total: 0.00
VAT: 0.00
Grand Total: 0.00

11. Click in the **Reference No** field of the Reference Type you wish to link to this order.

- The example has **Serial No** selected.

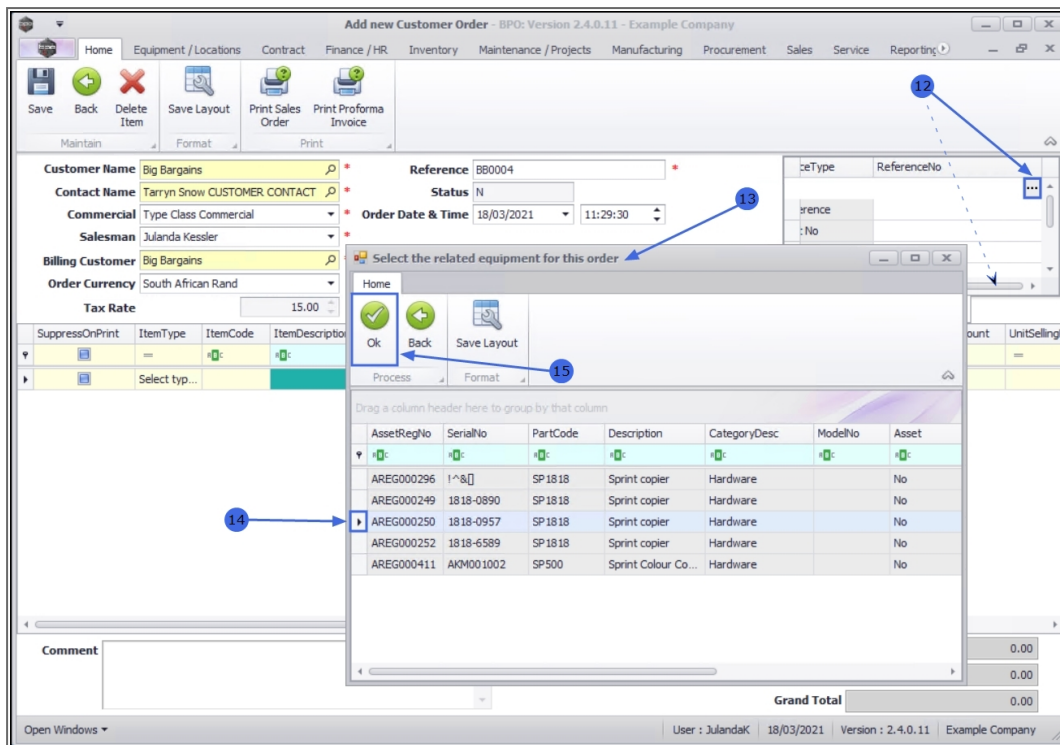


12. An **ellipsis** button will be available at the end of the field.
 - Use the scroll bar to scroll to the left or right of the screen to display information that may be hidden.
13. Click on the ellipsis button to display the **Select the related equipment for this order** screen.



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

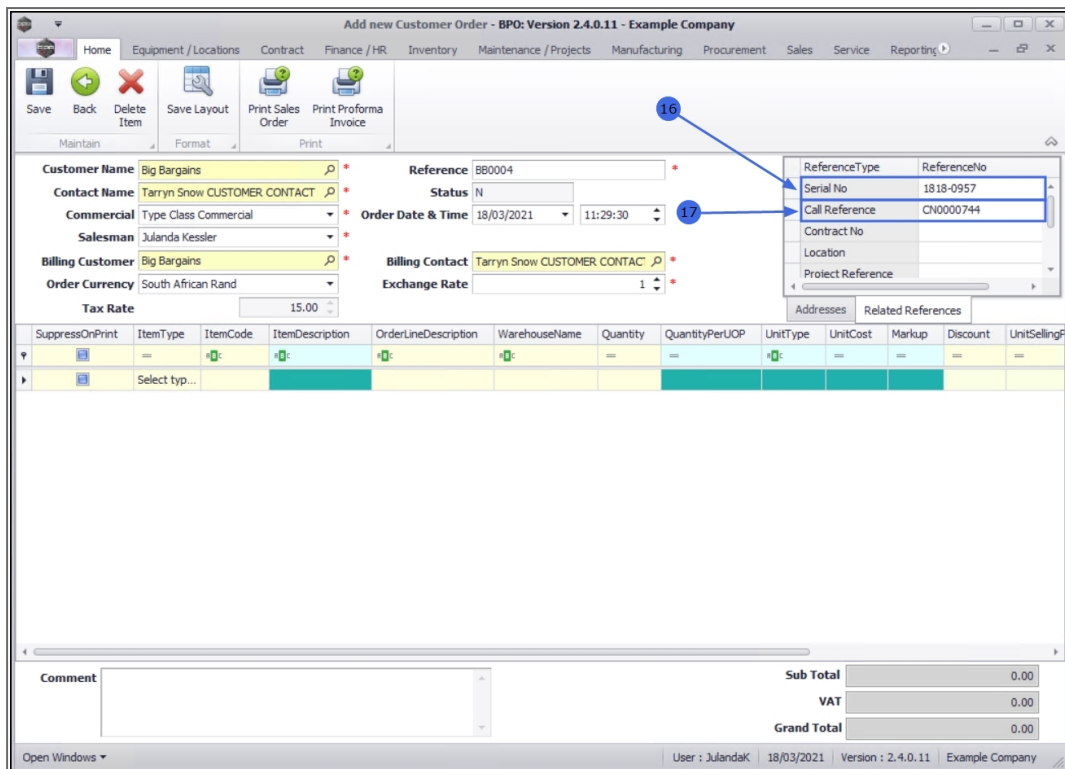
14. Click on the **row** of the item that you wish to link to this sales order.
15. Click on **OK**.



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.

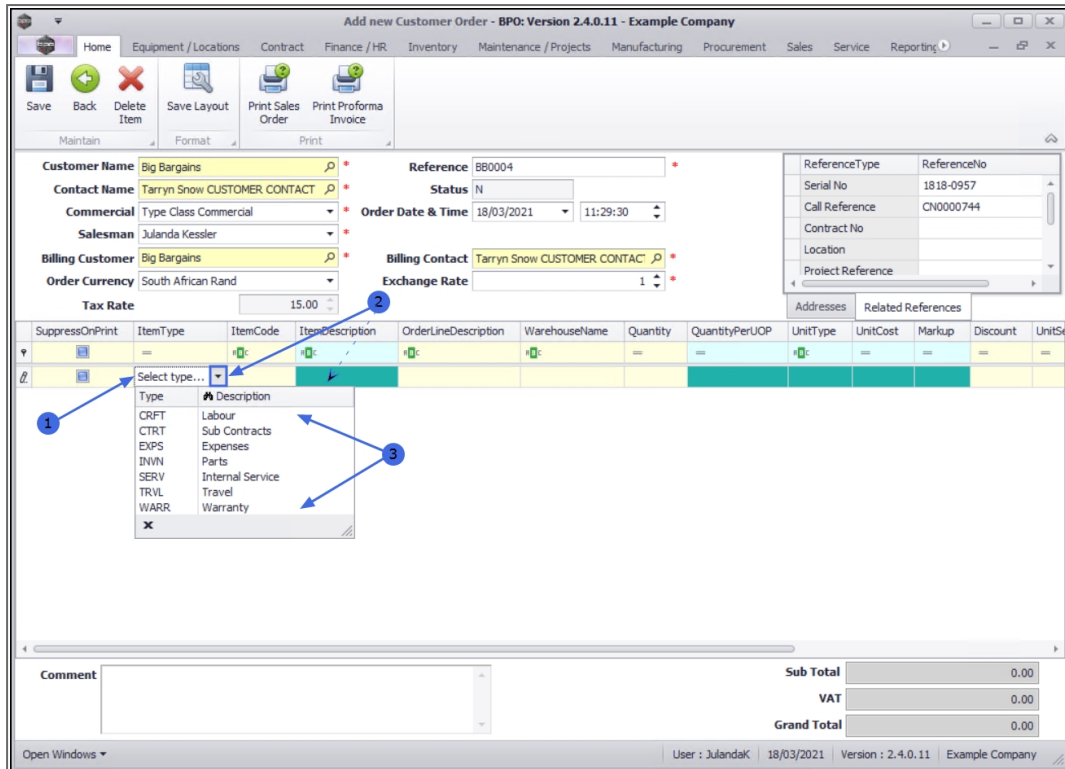


There can be different variations of this e.g. a selected **Order No** can have a **Work Order** or **Project Reference** linked to it.



ADD SALES ORDER ITEMS

1. 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 one 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

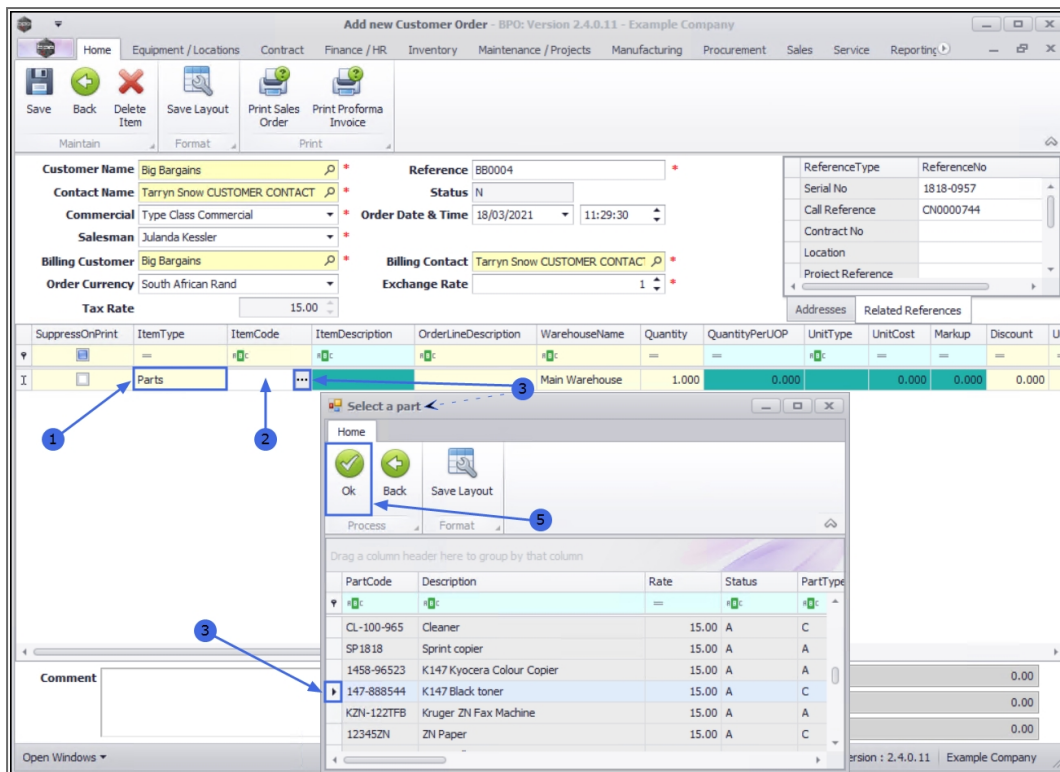


1. The example has **Parts** as the Item Type selected.
2. Click in the **Item Code** text box to display the **ellipsis** button.
3. Clicking on this button will display the **Select a []** screen.



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

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



Add new Customer Order - BPO: Version 2.4.0.11 - Example Company

Customer Name: Big Bargains
 Contact Name: Tarryn Snow CUSTOMER CONTACT
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Big Bargains
 Order Currency: South African Rand
 Tax Rate: 15.00

Reference: BB0004
 Status: N
 Order Date & Time: 18/03/2021 11:29:30
 Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Exchange Rate: 1

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	Un
	Parts				Main Warehouse	1.000	0.000		0.000	0.000	0.000	

Select a part

PartCode	Description	Rate	Status	PartType
CL-100-965	Cleaner	15.00	A	C
SP1818	Sprint copier	15.00	A	A
1458-96523	K147 Kyocera Colour Copier	15.00	A	A
147-888544	K147 Black toner	15.00	A	C
KZN-1227FB	Kruger ZN Fax Machine	15.00	A	A
12345ZN	ZN Paper	15.00	A	C

Edit the Quantity, Discount and Unit Selling Price

- 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.

Add new Customer Order - BPO: Version 2.4.0.11 - Example Company

Customer Name: Big Bargains
 Contact Name: Tarryn Snow CUSTOMER CONTACT
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Big Bargains
 Order Currency: South African Rand
 Tax Rate: 15.00

Reference: BB0004
 Status: N
 Order Date & Time: 18/03/2021 13:37:10
 Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Exchange Rate: 1

SuppressOnPrint	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice
	147-888544	K147 Black toner	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.000

Sub Total: 2,160.00
 VAT: 324.00
 Grand Total: 2,484.00

- 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.

Add new Customer Order - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Customer Name: Big Bargains
 Contact Name: Tarryn Snow
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Big Bargains
 Order Currency: South African Rand
 Tax Rate: 15.00


Reference: BB0004
 Status: N
 Order Date & Time: 29/09/2021 14:22:52
 Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Exchange Rate: 1

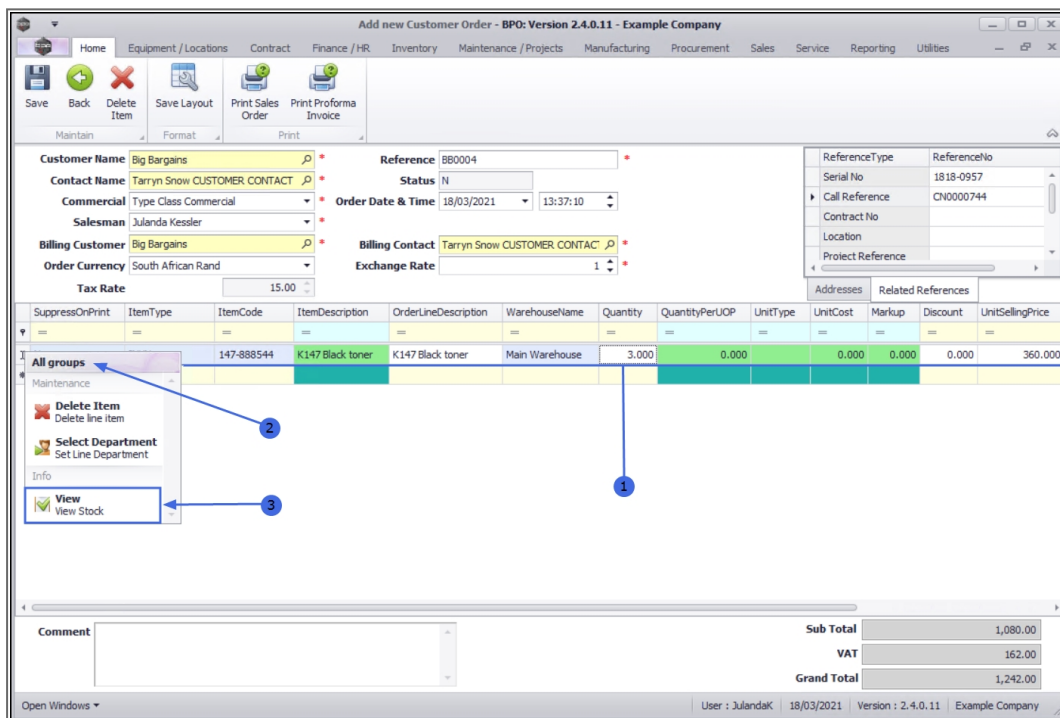
ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status
I	147-888544	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.000	360.000	15.000	Sales Deba...	A

Sub Total: 1,080.00
 VAT: 162.00
 Grand Total: 1,242.00

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



The screenshot shows the 'Add new Customer Order' window for 'Example Company'. The window has a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Save, Back, Delete Item, Save Layout, Print Sales Order, and Print Proforma Invoice. The main area is divided into several sections: Customer Information (Customer Name, Contact Name, Commercial, Salesman, Billing Customer, Order Currency, Tax Rate), Reference Information (Reference, Status, Order Date & Time, Billing Contact, Exchange Rate), and a table of items. The 'All groups' drop-down menu is open, showing options like 'Delete Item', 'Select Department', and 'View View Stock'. The 'View View Stock' option is highlighted. The table below shows the current stock data for the selected item.

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice
		147-888544	K147 Black toner	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.000

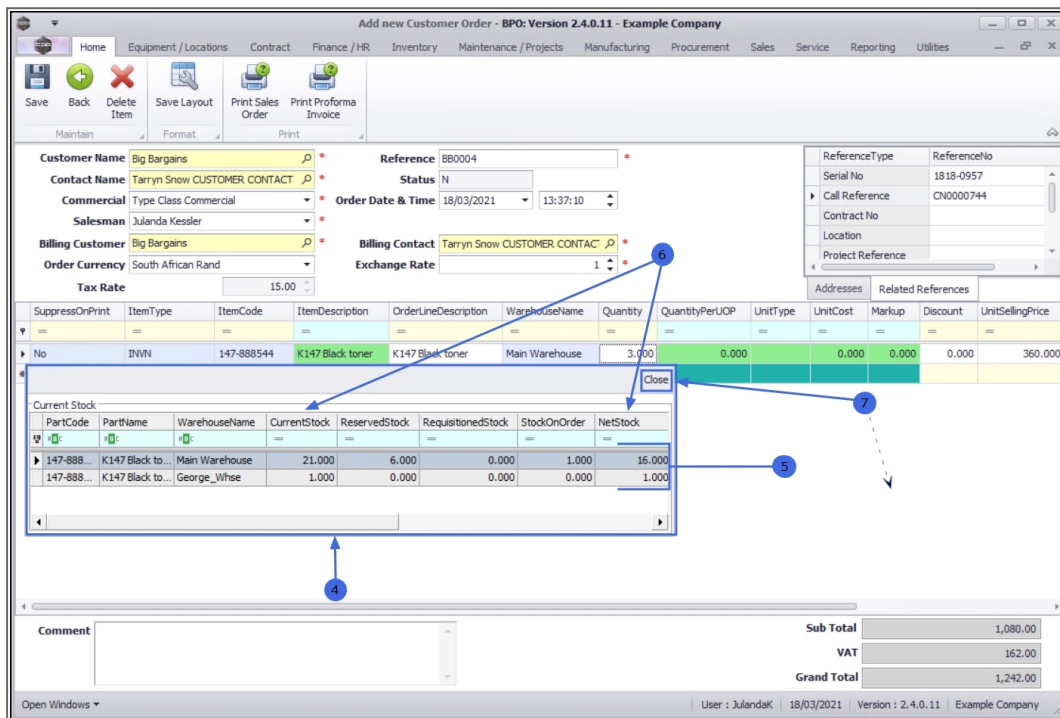
At the bottom right, there is a summary section with the following values:

Sub Total	1,080.00
VAT	162.00
Grand Total	1,242.00

The status bar at the bottom shows 'User : JulandaK', '18/03/2021', 'Version : 2.4.0.11', and 'Example Company'.

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.
7. This list now also returns alternate parts in stock : Version Compatibility¹
8. Click on **Close** or anywhere outside the Current Stock data grid to close the window.



Add additional line items

8. 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



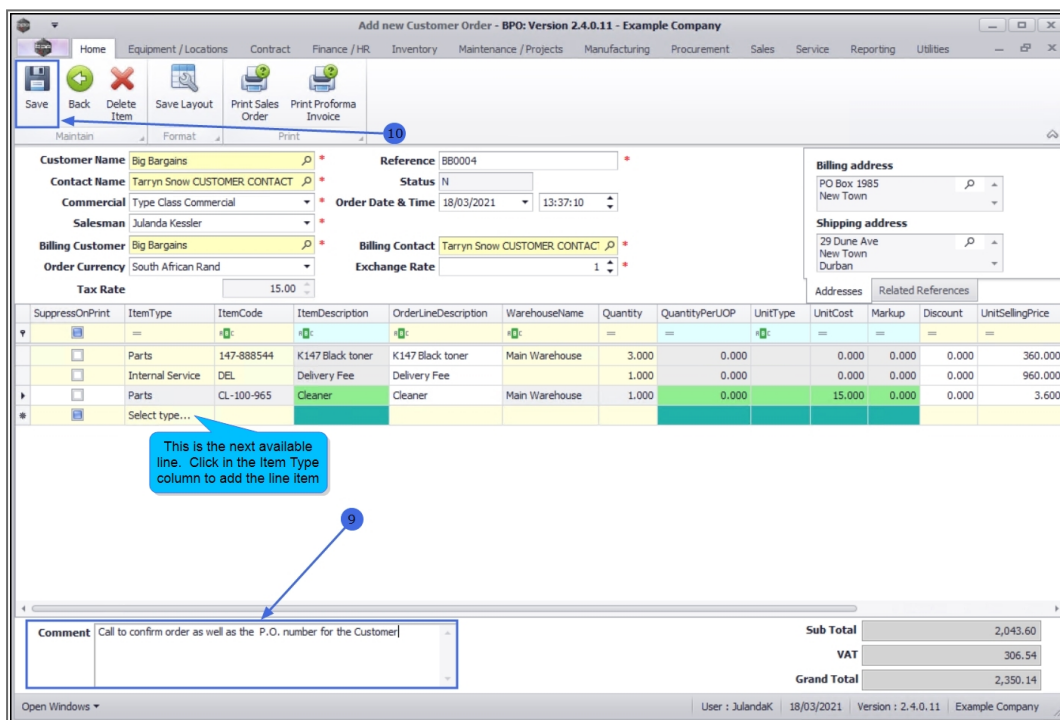
Click only on the **Suppress on Print** column check boxes of the items that you do **not** want visible on the printed Sales Invoice. This will not affect the **Sub/Grand Total** but the selling prices that are visible will not match up with the invoice totals.

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**.



11. The **Sales Orders** listing screen will be updated with the new sales order you have created.

Sales Orders - BPO Version 2.4.6.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Forward Create Invoice Create New Deal Add Items to WO New Deal Project Save Layout Workspaces Print Sales Order Print Proforma Invoice Export

Duration: Durbun New order Refresh

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	Depth
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	06/01/2019	Bianca Surend...	1.00	15.00	04:50:21		
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	06/01/2019	Bianca Surend...	1.00	15.00	04:51:52		
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	06/01/2019	Bianca Surend...	1.00	15.00	04:58:22		
OR0000286	BEA001	Bearing and Shoe	New order	quotereTest	0.00	ZAR	06/01/2019	Bianca Surend...	1.00	15.00	04:59:34		
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	06/01/2019	Bianca Surend...	1.00	15.00	05:06:46		
OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/01/2019	Bianca Du Toit	1.00	15.00	10:12:42		
OR0000297	NEW 001	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kane Pflay	1.00	15.00	12:31:21		
OR0000303	PK0001	Pink Shoes	New order	Test email	241,895.60	ZAR	06/04/2020	Kane Pflay	1.00	15.00	16:35:25		
OR0000304	OPP001	Office Supplies Unlim.	New order	test 1	12,333.75	ZAR	14/04/2020	Sine Ndulane	1.00	15.00	10:27:06		
OR0000305	PAH001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kane Pflay	10.00	0.00	11:59:51		
OR0000308	TSA001	Titan Group	New order	HRTest	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
OR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	26/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
OR0000313	BOT0001	Botbas Networking Inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
OR0000314	BOT0001	Botbas Networking Inc	New order	om	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
OR0000315	BOT0001	Botbas Networking Inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
OR0000316	BIG0001	Big Bergains	New order	BIG0004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
OR0000317	APP0001	Apple Juice Inc	New order	reFO076	345.00	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	15:50:36		
OR0000320	OPP001	Office Supplies Unlim.	New order	OSU1001	3,236.17	ZAR	24/02/2021	Sasha Jones	1.00	15.00	11:36:10		
OR0000321	DAN002	Dancing Shoes	New order	SO100	1,144.25	ZAR	10/03/2021	Abigail Ntse	1.00	15.00	22:46:29		
OR0000322	BIG0001	Big Bergains	New order	BB0004	2,350.14	ZAR	18/03/2021	Julanda Kessler	1.00	15.00	13:37:10		

Open Windows *

User : JulandaK 18/03/2021 Version : 2.4.6.11 Example Company

Related Topics

- [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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