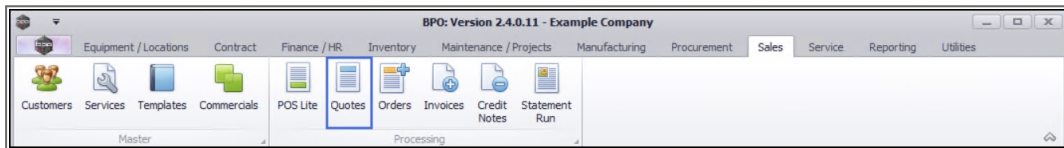


SALES

ORDERS – EDIT SALES ORDER

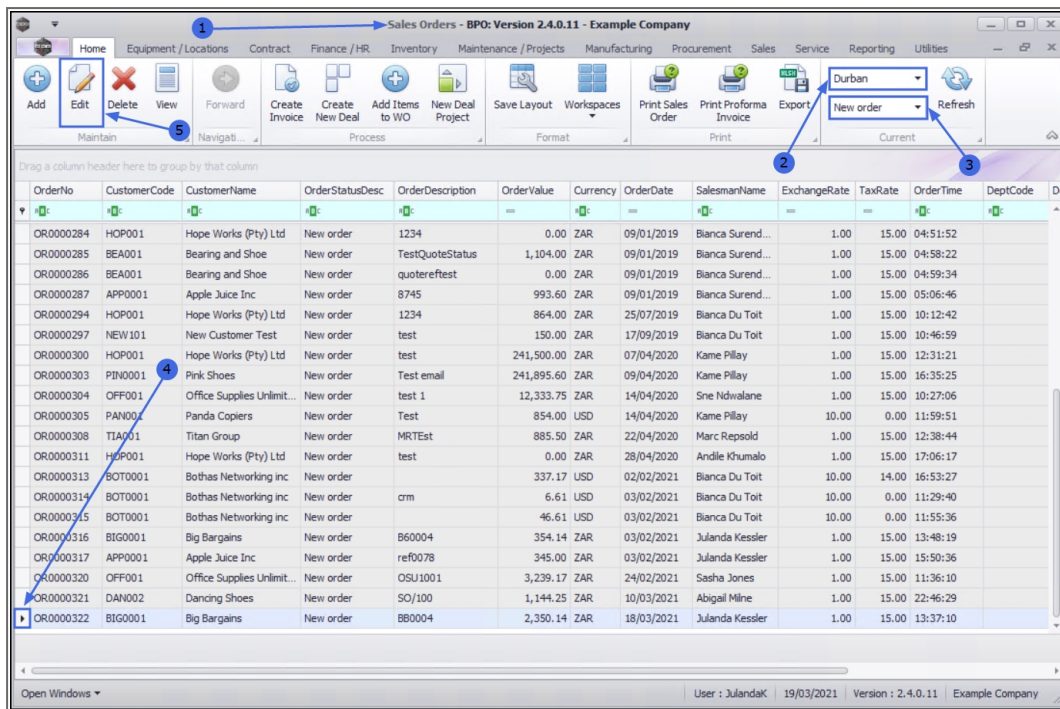
Ribbon Access: Sales > Orders



1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where the Sales Order is located.
 - The example has **Durban** selected.
3. To edit an Order ensure that the **Status** is set to **New Order** or **Pro-forma**.
 - The example has **New Order** selected.
4. Select the **row** of the Sales Order that you wish to **edit**.
5. Click on **Edit**.



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

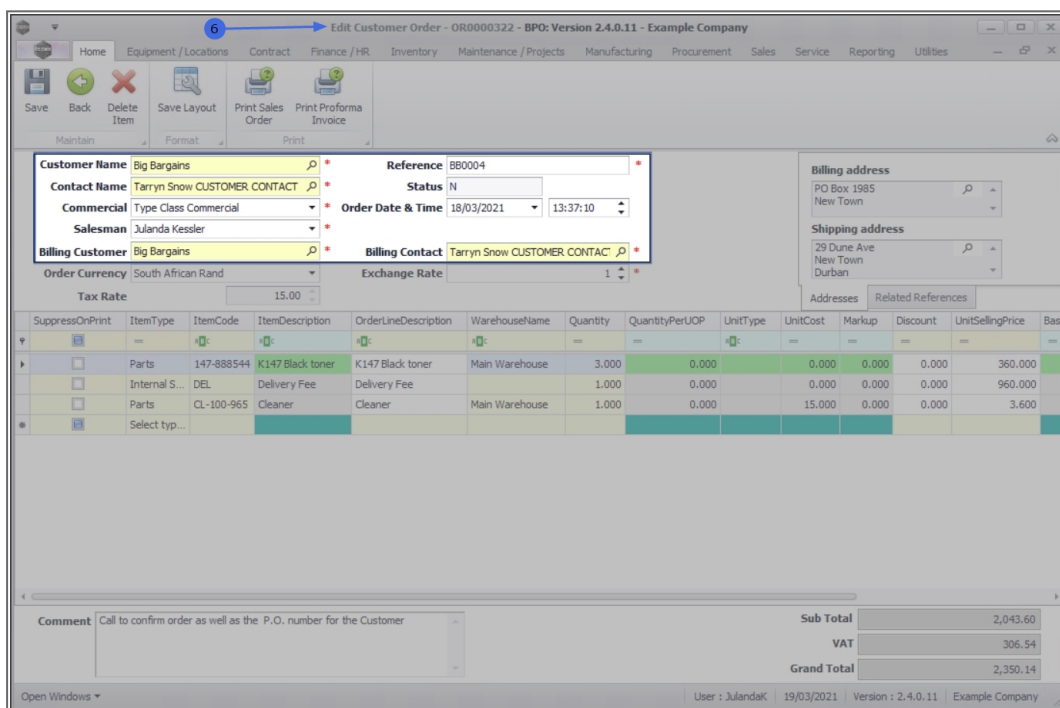


6. The **Edit Customer Order** - [customer code] screen will be displayed.

HEADER INFORMATION

- **Customer Name:** Click on the **search button** to select an alternative customer name.
- **Contact Name:** Click on the **search button** to select an alternative customer contact.
- **Commercial:** This is the default commercial configured for the customer. Click on the down **arrow** to select an alternative commercial from the list.
- **Salesman:** Click on the down **arrow** to select an alternative salesman from the list.
- **Billing Customer:** To change the billing customer, click on the **search button** to select the customer who will be billed for the order.
- **Reference:** Click in the text box to update the reference number.

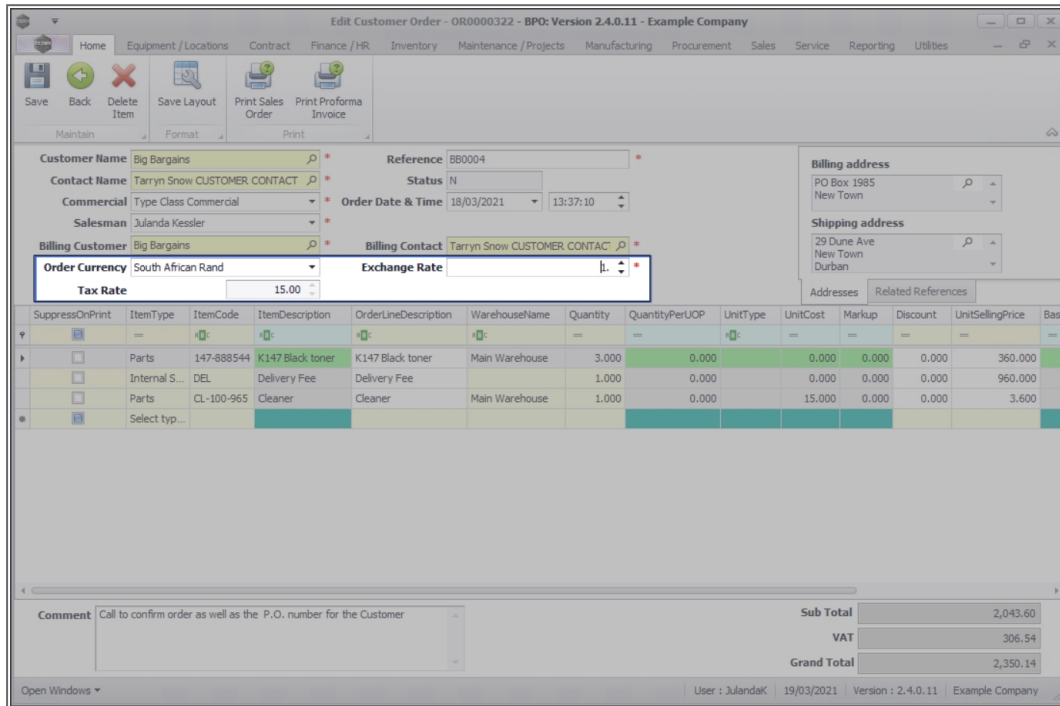
- **Status:** The status for the order will display as **[N]** for **New order** or **[F]** for **Pro-forma**.
- **Order Date and Time:** The date and time the order has been placed, will display.
 - To change the date, type in or click on the arrow to choose an alternative date using the Calendar function.
 - To adjust the time, type in or click on the arrow indicators.
- **Billing Contact:** Click on the **search button** to select an alternative billing contact.



FINANCIAL HEADER

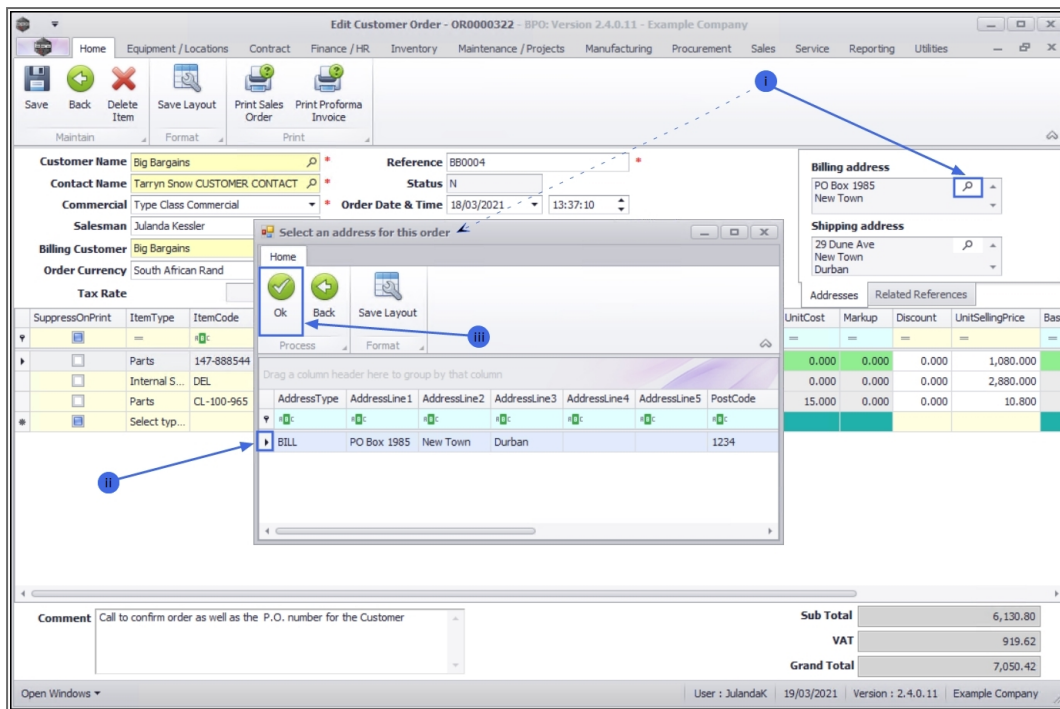
- **Order Currency:** Click on the **search button** to select an alternative currency from the menu.

- **Tax Rate:** This field will populate based on the currency set up for the customer and cannot be edited from this screen.
- **Exchange Rate:** This will populate based on the exchange rate set up in the system. Use the directional arrows to increase or decrease the exchange rate.

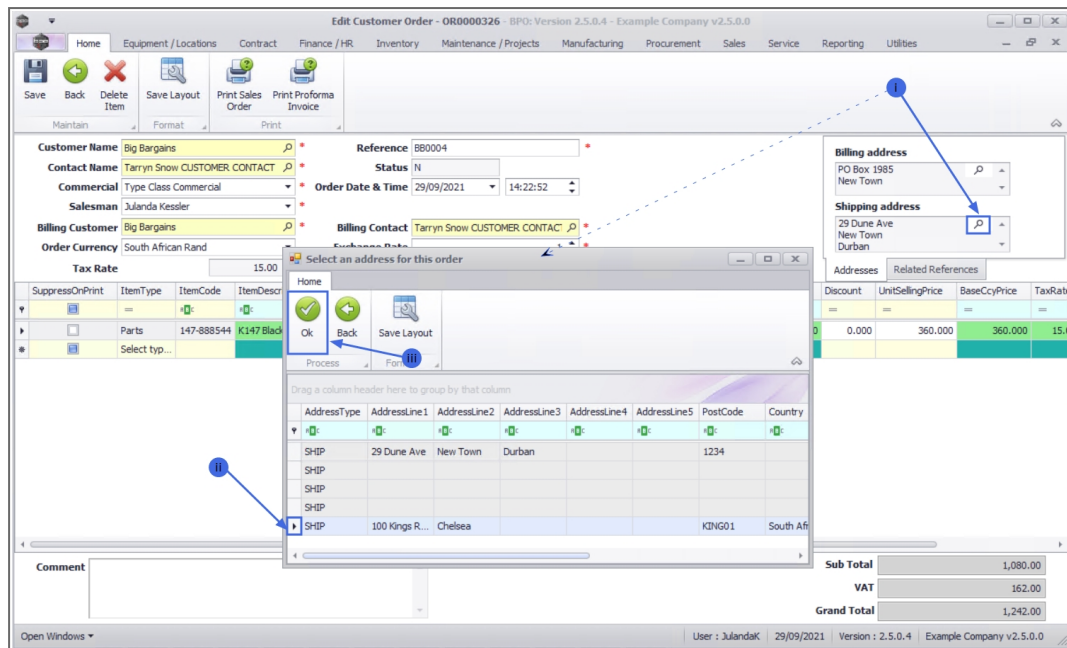


ADDRESSES TAB

- **Billing Address:** A billing address needs to be added for the customer before linking the order.
 - To change the Billing Address, click on the **search** button to display the **Select an address for this order** screen.
 - Click on the **row** of the Billing Address that you wish to add.
 - Click on **OK**.

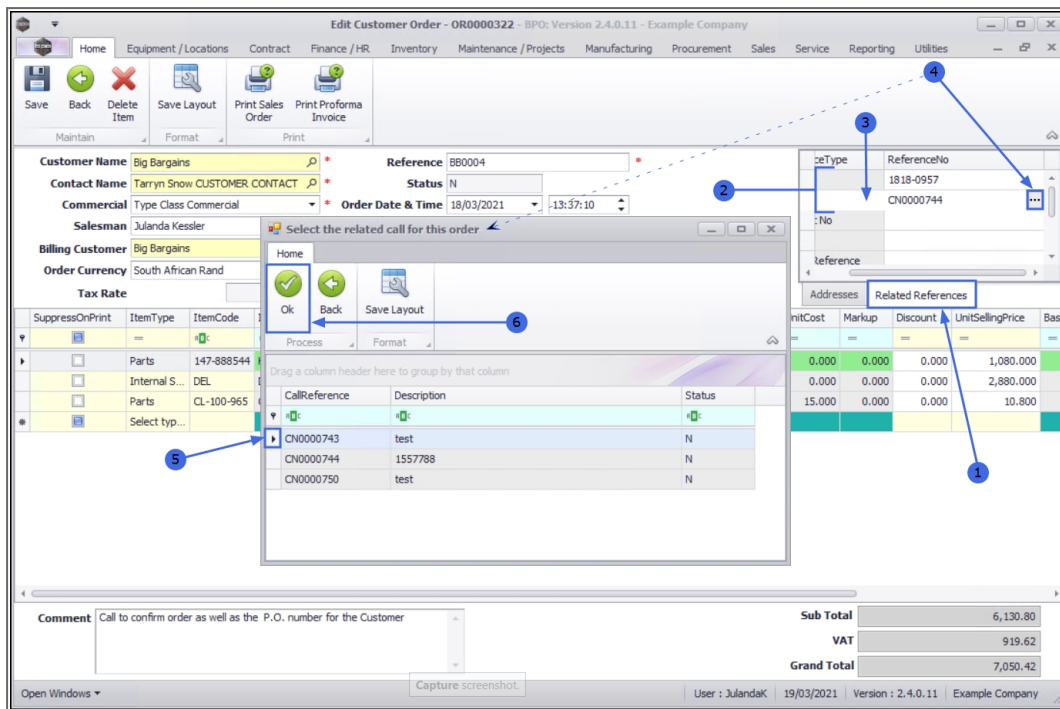


- **Shipping Address:** Ensure that a Shipping Address has been added for the Customer.
 - i. Add or change the shipping address by clicking on the **search** button to display the **Select an address for this order screen**.
 - ii. Click on the **row** of the shipping address you would like to add for this customer.
 - iii. Click on **OK**.



RELATED REFERENCES TAB

1. Click on the **Related References** tab.
2. Any reference numbers that have references **linked** to it, will be displayed. For example if the order is linked to a **call** or a **project**, then the call or project number will be displayed.
3. To **add** a reference number, or to **change** a reference number, click in the Reference Number column of the Reference Type you wish to work with, to display the ellipsis button.
 - The example has **Call Reference** selected.
4. Click on the **ellipsis** button to display the **Select the related call for this order** list screen.
5. Click on the **row** of the Reference number that you wish to add.
6. Click on **OK**.



Edit Customer Order - OR0000322 - 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: [blank]

Reference: BB0004
 Status: N
 Order Date & Time: 18/03/2021 -13:37:10

Select the related call for this order

CallReference	Description	Status
CN0000743	test	N
CN0000744	1557788	N
CN0000750	test	N

Comment: Call to confirm order as well as the P.O. number for the Customer

Sub Total: 6,130.80
 VAT: 919.62
 Grand Total: 7,050.42

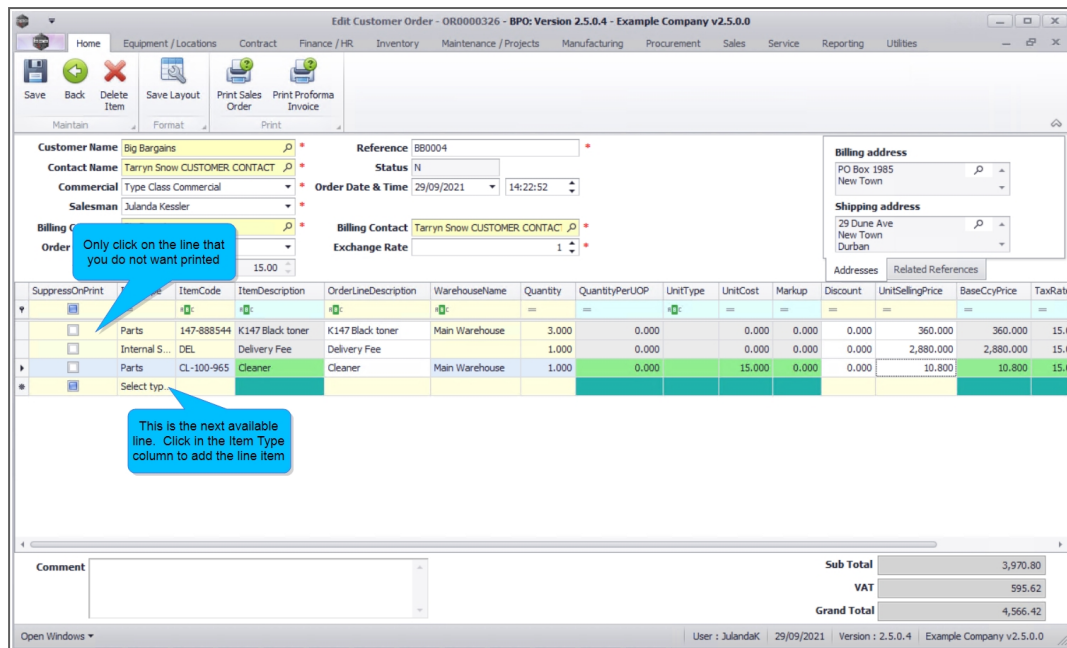
EDIT SALES ORDER ITEMS

1. **Suppress On Print Check Box:** Only click on the check box in the line of the item that you do **not** want printed on the Sales Invoice.



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

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



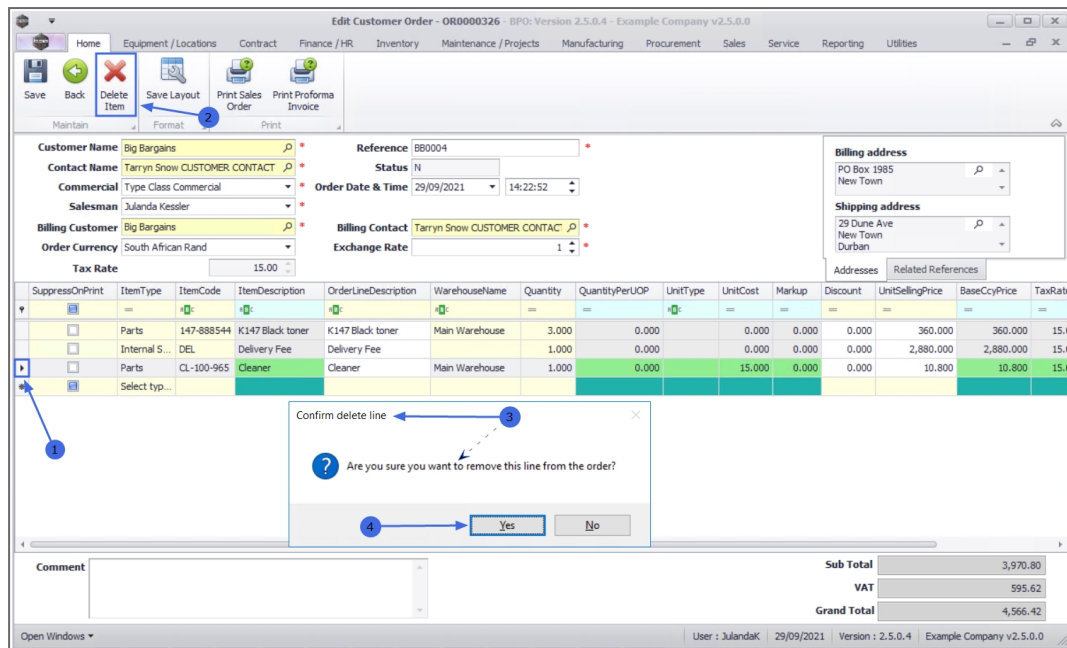
Delete Item line entry

1. To delete an item entry from the order, click in the **row** of the item that you wish to remove.
2. Click on **Delete Item**.



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

3. When you receive the **Confirm delete line** message to confirm;
 - **Are you sure you want to remove this line from the order?**
4. Click on **Yes** if you are certain about your selection, or
 - Click on **No** to ignore the request and leave the item line on the order.



SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
	Parts	147-888544	K147 Black toner	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.000	360.000	15.4
	Internal S...	DEL	Delivery Fee	Delivery Fee	Main Warehouse	1.000	0.000		0.000	0.000	0.000	2,880.000	2,880.000	15.4
	Parts	CL-100-965	Cleaner	Cleaner	Main Warehouse	1.000	0.000		15.000	0.000	0.000	10.800	10.800	15.4

Sub Total	3,970.80
VAT	595.62
Grand Total	4,566.42

Edit Quantity, Discount and Unit Selling Price

1. Make the relevant adjustments to the **Quantity**, **Discount** or **Selling Price** by typing in the new value or amount, or use the arrow indicators to adjust the value or amount.

SAVE SALES ORDER

2. When all the necessary changes have been made to the Sales Order, click on **Save** to return to the Sales Orders listing screen.

Edit Customer Order - OR0000322 - BPO: Version 2.4.0.11 - Example Company

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

Save Back Delete Item Save Layout Print Sales Order Print Proforma Invoice

Customer Name: Big Bargains Reference: BB0004
 Contact Name: Tarryn Snow CUSTOMER CONTACT Status: N
 Commercial: Type Class Commercial Order Date & Time: 18/03/2021 13:37:10
 Salesman: Julanda Kessler Billing Contact: Tarryn Snow CUSTOMER CONTACT
 Billing Customer: Big Bargains Exchange Rate: 1
 Order Currency: South African Rand Tax Rate: 15.00

Billing address: PO Box 1985 New Town
 Shipping address: 29 Dune Ave New Town Durban

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	Base
	Parts	147-888544	K147 Black toner	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	10.000	1,080.000	
	Internal S...	DEL	Delivery Fee	Delivery Fee		1.000	0.000		0.000	0.000	0.000	2,880.000	
	Parts	CL-100-965	Cleaner	Cleaner	Main Warehouse	1.000	0.000		15.000	0.000	0.000	10.800	
	Select typ...												

Comment: Call to confirm order as well as the P.O. number for the Customer

Sub Total: 5,806.80
 VAT: 871.02
 Grand Total: 6,677.82

Open Windows User: JulandaK 19/03/2021 Version: 2.4.0.11 Example Company

Related Topics

- [Add a Sales Order](#)
- [Print / Email 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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