

We are currently updating our site; thank you for your patience.

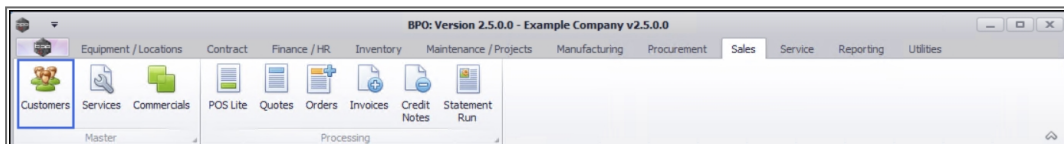
SALES

CUSTOMERS – ORDERS

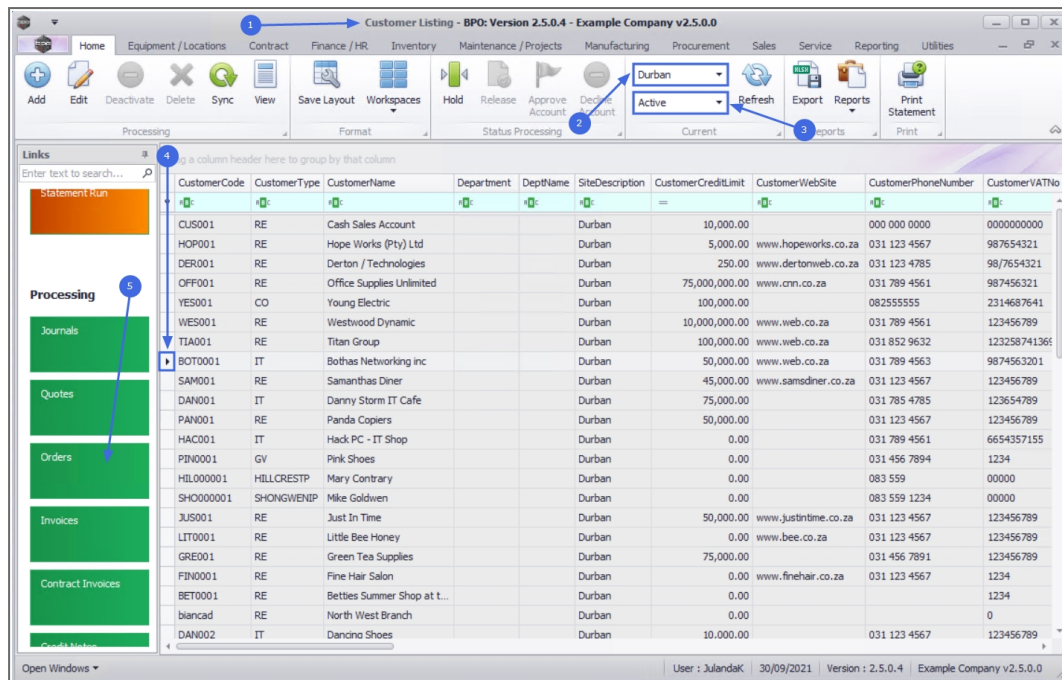
The **Orders** tile direct you to a list of Sales Orders for a selected Customer.

This manual is a brief look at Sales Orders, accessed from the **Customer Listing** screen. For a detailed handling of the topic click on the link to redirect to the Sales Orders manual.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Select the **row** of the **customer** whose sales orders you wish to work with.
5. Click on the **Orders** tile.



6. The **Sales Orders for Customer** [Customer Code] screen will be displayed.



The **Site** from the Customer Listing screen will not automatically pull through to the **Sales Orders for Customer** screen.

7. Click on the **arrow** to change the **Site** filter.
 - The **Sales Orders for Customer** listing screen will be updated with the Customer Orders for the selected site.

ADD SALES ORDER

8. Click on **Add**.



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

Sales Orders for Customer BOT0001 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

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

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000033	BOT0001	Bothas Networking inc	Invoiced order	OR 147	17,908.76	ZAR	02/07/2014	Belinda Sharman	1.00	0.00	11:27:55		
OR0000039	BOT0001	Bothas Networking inc	Invoiced order	OR 12 - Additional ...	74,999.88	ZAR	03/07/2014	Belinda Sharman	1.00	0.00	09:34:25		
OR0000150	BOT0001	Bothas Networking inc	Invoiced order	test forex with tax	147.63	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:15:13		
OR0000151	BOT0001	Bothas Networking inc	Invoiced order	forex tests	116.83	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:21:41		
OR0000152	BOT0001	Bothas Networking inc	Invoiced order	forest tests projec...	148.68	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:33:09		
OR0000153	BOT0001	Bothas Networking inc	Invoiced order	1234	13.11	USD	26/10/2016	Blanca Du Toit	10.00	14.00	13:13:45		
OR0000210	BOT0001	Bothas Networking inc	Pro-forma	test	71.25	USD	07/08/2017	Blanca Du Toit	10.00	0.00	11:41:28		
OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Blanca Du Toit	10.00	14.00	16:53:27		
OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Blanca Du Toit	10.00	0.00	11:29:40		
OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Blanca Du Toit	10.00	0.00	11:55:36		

Open Windows User : JulandaK 01/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

9. The **Add new Customer Order** screen will be displayed.
10. Complete the **Sales Order Header** and the **Financial Header** Information.
11. Confirm the **Billing and Shipping Addresses** for the customer, if these fields were not auto populated when you entered the order header information.

9 → Add new Customer Order - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Maintain Format Print

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 B6004
 Status N
 Order Date & Time 01/04/2022 14:09:20
 Billing Contact Tarryn Snow CUSTOMER CONTACT
 Exchange Rate 1

Billing address
 PO Box 1985
 New Town

Shipping address
 29 Dune Ave
 New Town
 Durban

Addresses Related References

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Parts	SP 109-147K	Black toner	Black toner	Main Warehouse	1.000	0.000		350.000	15.000	0.000	402.500	402.500
	Select typ...												

Comment

Sub Total 402.50
 VAT 60.38
 Grand Total 462.88

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RELATED REFERENCES

- Click on the **Related References** tab to link the reference information for the customer Order.

LINE ITEMS AND COMMENTS

- " **Add Sales Order Items** " on page 11 as required.
- Click in the **Comments text box** to type a comment related to the Order.
- Click on **Save** to save the customer Order.

For a detailed handling of this topic refer to [Orders - Add Sales Order](#)

Add new Customer Order - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Maintain 15 Format Print

Customer Name Big Bargains Reference B6004
 Contact Name Tarryn Snow CUSTOMER CONTACT Status N
 Commercial Type Class Commercial Order Date & Time 01/04/2022 14:09:20
 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

ReferenceType ReferenceNo
 Serial No
 Call Reference
 Contract No
 Location
 Protect Reference
 Addresses Related References

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SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
	Parts	SP 109-147K	Black toner	Black toner	Main Warehouse	1.000	0.000		350.000	15.000	0.000	402.500	402.500
	Select typ...												

13

Comment

14

Sub Total 402.50
 VAT 60.38
 Grand Total 462.88

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16. The **Sales Orders for Customer** listing screen will be updated with the new Order that you have created.

Sales Orders for Customer BOT0001 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Add Edit Delete View Back Forward Create Invoice Create New Deal Add Items to W/O New Deal Project Save Layout Workspaces Print Sales Order Print Proforma Invoice Expert

Maintain Navigation Process Format Print Refresh

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000033	BOT0001	Bothas Networking inc	Invoiced order	OR 147	17,908.76	ZAR	02/07/2014	Belinda Sherman	1.00	0.00	11:27:55		
OR0000039	BOT0001	Bothas Networking inc	Invoiced order	OR 12 - Additional ...	74,999.88	ZAR	03/07/2014	Belinda Sherman	1.00	0.00	09:34:25		
OR0000130	BOT0001	Bothas Networking inc	Invoiced order	test forex with tax	147.63	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:15:13		
OR0000151	BOT0001	Bothas Networking inc	Invoiced order	forex tests	116.83	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:21:41		
OR0000152	BOT0001	Bothas Networking inc	Invoiced order	forex tests project ...	148.68	USD	25/10/2016	Blanca Du Toit	10.00	14.00	16:33:09		
OR0000153	BOT0001	Bothas Networking inc	Invoiced order	1234	13.11	USD	26/10/2016	Blanca Du Toit	10.00	14.00	13:13:45		
OR0000210	BOT0001	Bothas Networking inc	Pro-forma	test	71.29	USD	07/06/2017	Blanca Du Toit	10.00	0.00	11:41:28		
OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Blanca Du Toit	10.00	14.00	16:53:27		
OR0000314	BOT0001	Bothas Networking inc	New order	om	6.61	USD	03/02/2021	Blanca Du Toit	10.00	0.00	11:29:40		
OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Blanca Du Toit	10.00	0.00	11:55:36		

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EDIT SALES ORDER

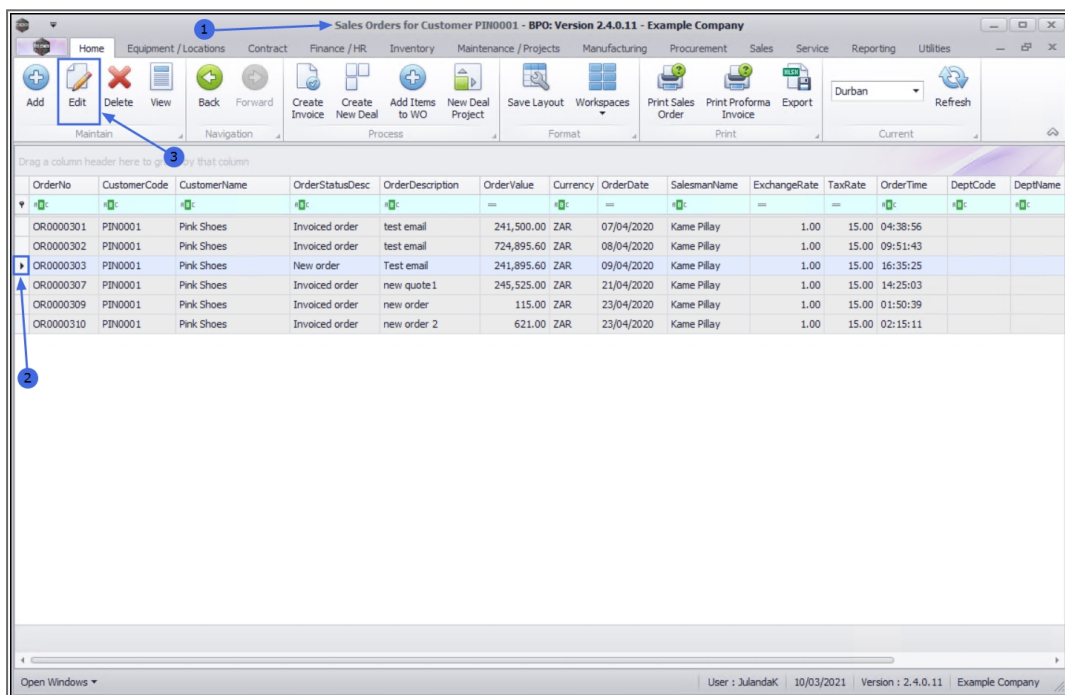


Sales Orders that have already been invoiced will not be available for editing.

1. From the **Sales Orders for Customer [Customer Code]** listing screen,
2. Click in the **row** of the Sales Order that you wish to edit.
3. Click on **Edit**.



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

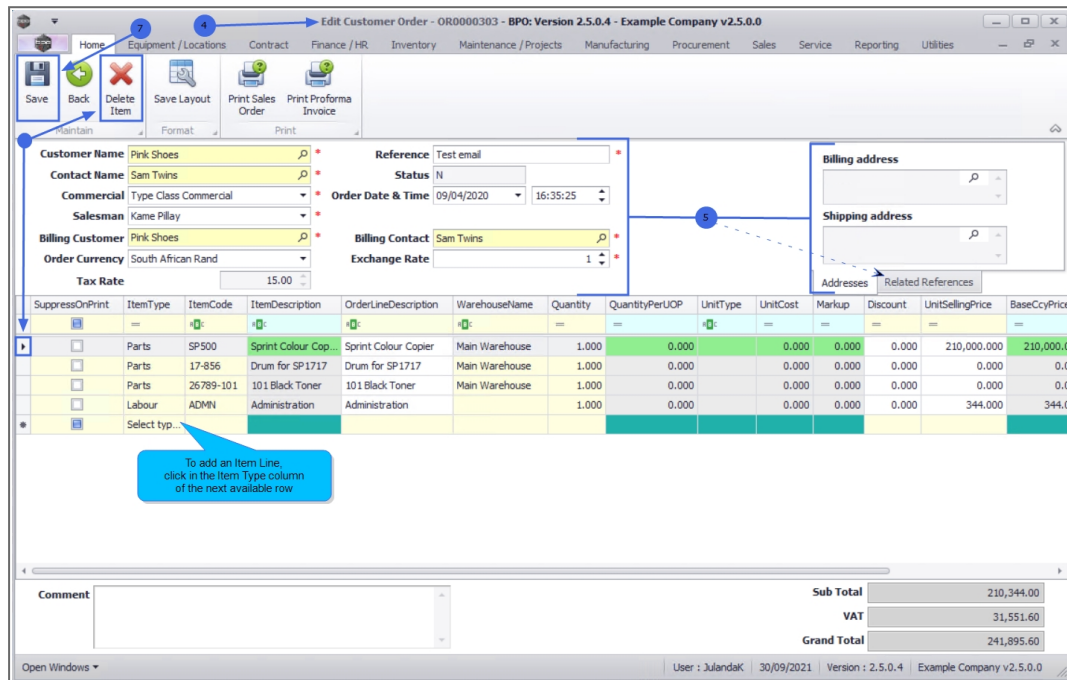


OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000301	PIN0001	Pink Shoes	Invoiced order	test email	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	04:38:56		
OR0000302	PIN0001	Pink Shoes	Invoiced order	test email	724,895.60	ZAR	08/04/2020	Kame Pillay	1.00	15.00	09:51:43		
OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
OR0000307	PIN0001	Pink Shoes	Invoiced order	new quote 1	245,525.00	ZAR	21/04/2020	Kame Pillay	1.00	15.00	14:25:03		
OR0000309	PIN0001	Pink Shoes	Invoiced order	new order	115.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	01:50:39		
OR0000310	PIN0001	Pink Shoes	Invoiced order	new order 2	621.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	02:15:11		

4. The **Edit Customer Order - OR[Order Number]** listing screen will display.
5. Make the required changes to the **Heading Information, Addresses** or **Related References** tabs.
6. Make the necessary changes to the Order Item frame:
 - To "**Add Sales Order Items**" on page 11, click in the Item Type column of the next available row.

- To "**Delete Item line entry**" on page 8, click on the **row** of the item you wish to remove, then click on **Delete Item**.
- Click on **Save** to save the changes to the Customer Order and return to the **Sales Orders for Customer** screen.

For a detailed handling of this topic refer to Orders - Edit Sales Order



DELETE SALES ORDER



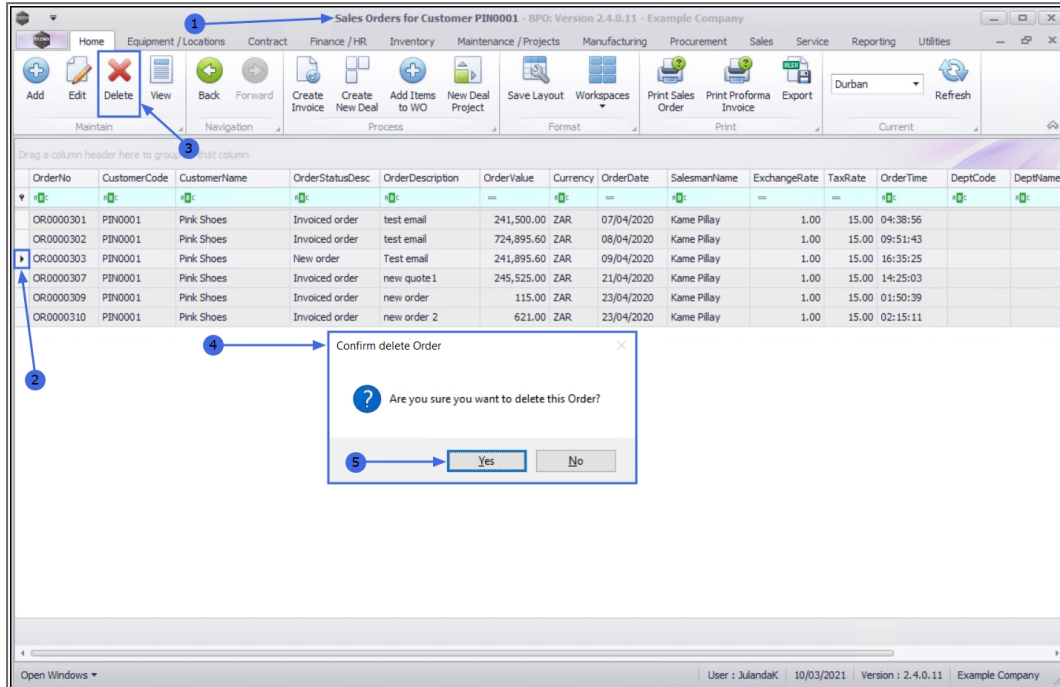
Orders that have already been invoiced will not be available for deletion.

- From the **Sales Orders for Customer: [Customer Code]** listing screen,
- Click on to the **row** of the Sales Quote that you wish to **remove**.
- Click on **Delete**.



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

4. The **Confirm delete Order** message prompt will display;
 - **Are you sure you want to delete this Order?**
5. If you are sure that this is the correct order that needs to be removed, then click on **Yes** to proceed.



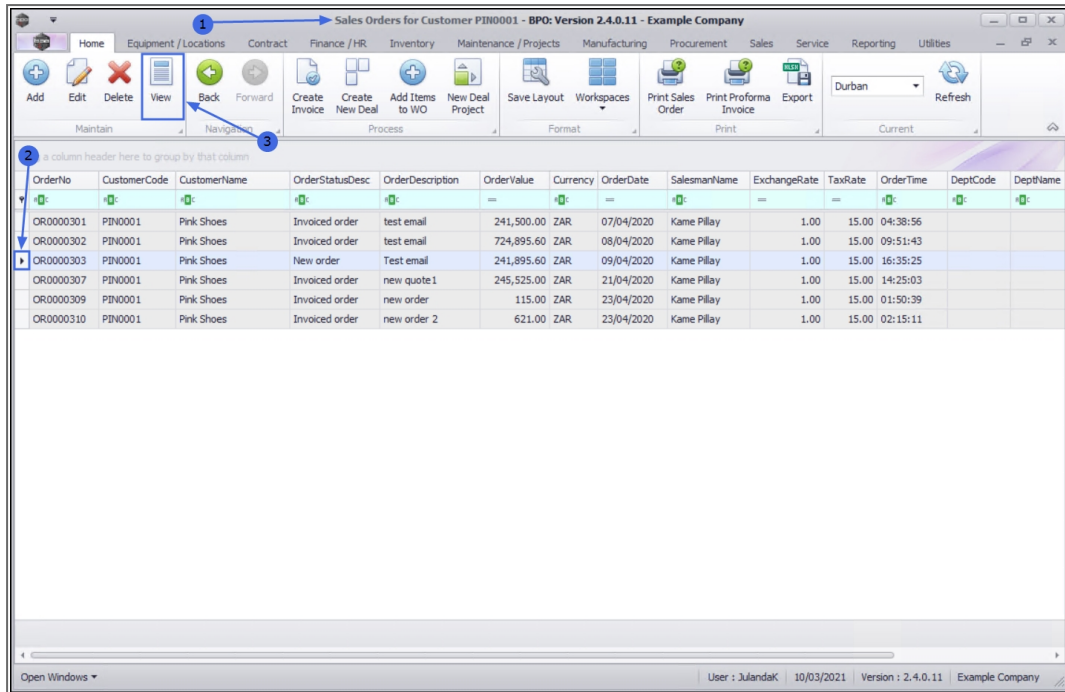
The Sales Order will be **removed** from the **Sales Orders for Customer** listing screen.

For a detailed handling of this topic refer to [Orders - Delete Sales Order](#)

VIEW CUSTOMER ORDER

An Order can be viewed in any status.

1. From the **Sales Orders for Customer: [Customer Code]** listing screen
2. Click on the **row** of the Sales Order that you wish to **view**.
3. Click on **View**.

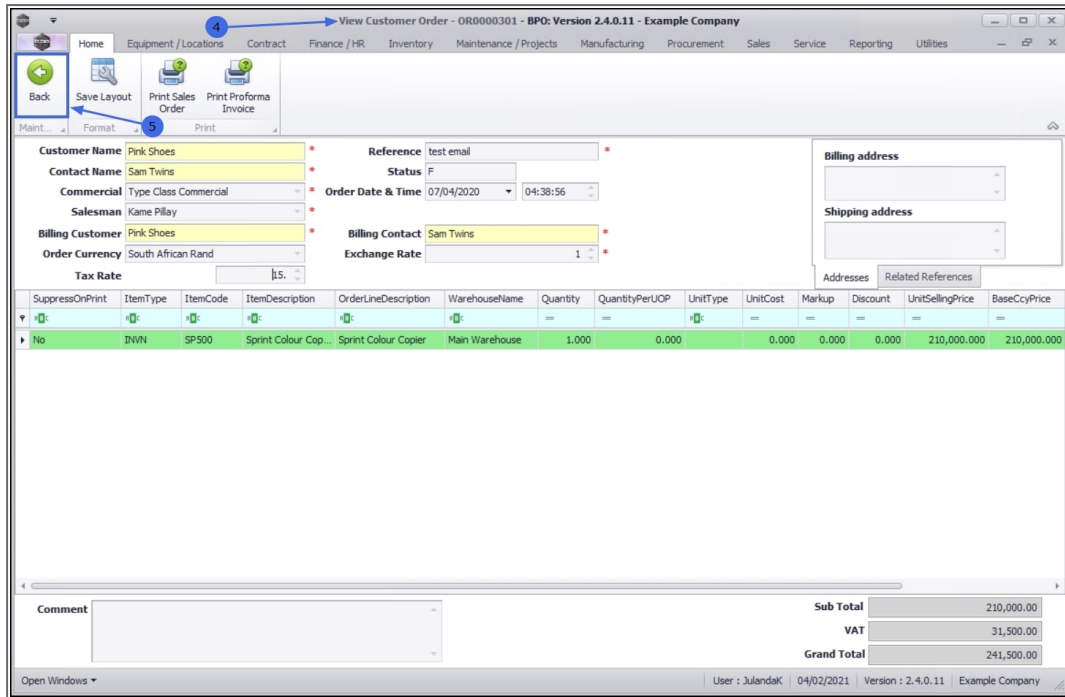


4. The **View Customer Order - OR[Order Number]** screen will display.



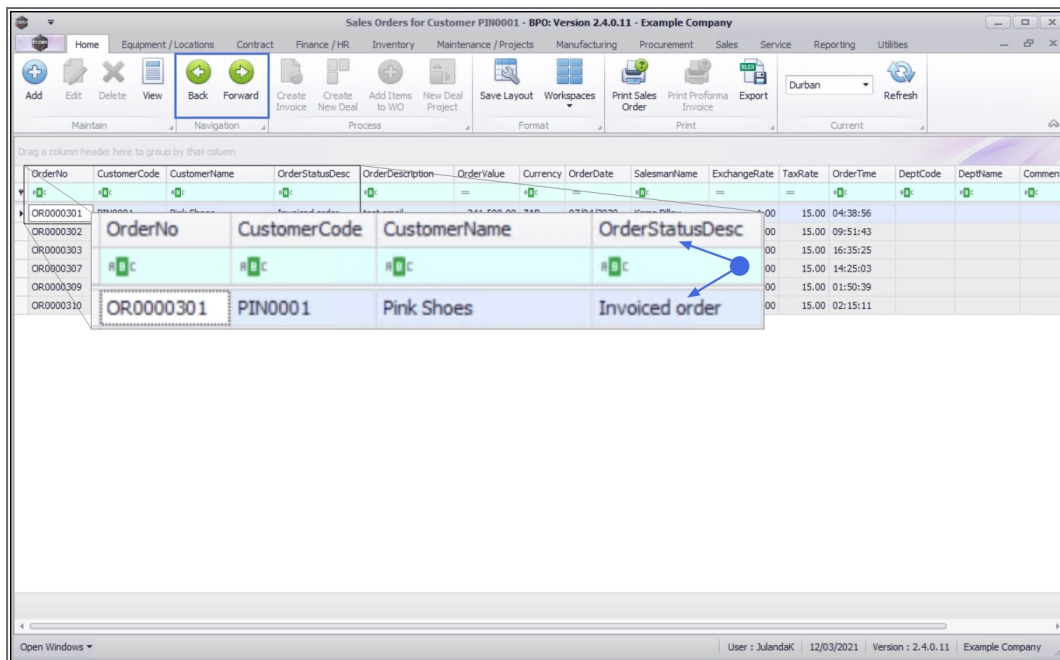
No changes can be made to the information on the Order as this is a view only screen.

5. Click **Back** to return to the **Sales Orders for Customer** listing screen.



ORDER NAVIGATION BUTTONS

- The **Forward** navigation button, is only available in the '[I] - Invoiced' Order Status. This allows for quick navigation to the related documentation by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The **Back** navigation button will transport you back to the **Customer Listing** screen.

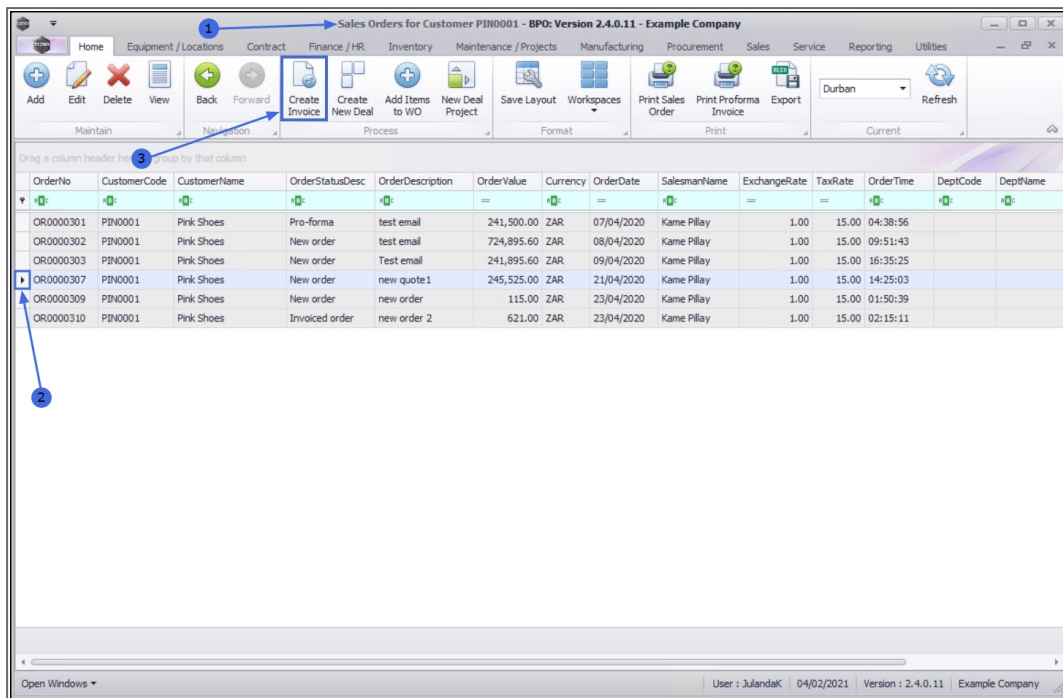


CREATE INVOICE

1. From the **Sales Orders for Customer [Customer Code]** screen,
2. Select the **row** of the Sales Order you wish to **create an invoice** for.
3. Click on **Create Invoice**.



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



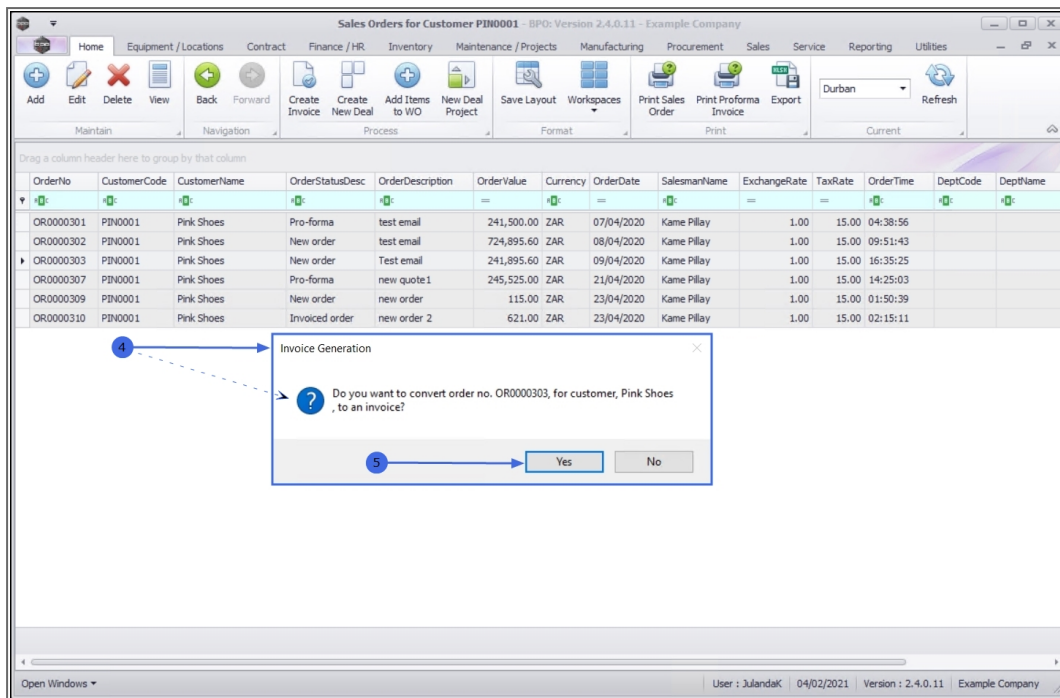
OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000301	PIN0001	Pink Shoes	Pro-forma	test email	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	04:38:56		
OR0000302	PIN0001	Pink Shoes	New order	test email	724,895.60	ZAR	08/04/2020	Kame Pillay	1.00	15.00	09:51:43		
OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
OR0000307	PIN0001	Pink Shoes	New order	new quote 1	245,525.00	ZAR	21/04/2020	Kame Pillay	1.00	15.00	14:25:03		
OR0000309	PIN0001	Pink Shoes	New order	new order	115.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	01:50:39		
OR0000310	PIN0001	Pink Shoes	Invoiced order	new order 2	621.00	ZAR	23/04/2020	Kame Pillay	1.00	15.00	02:15:11		



You will receive three (3) **Invoice Generation** prompt messages:

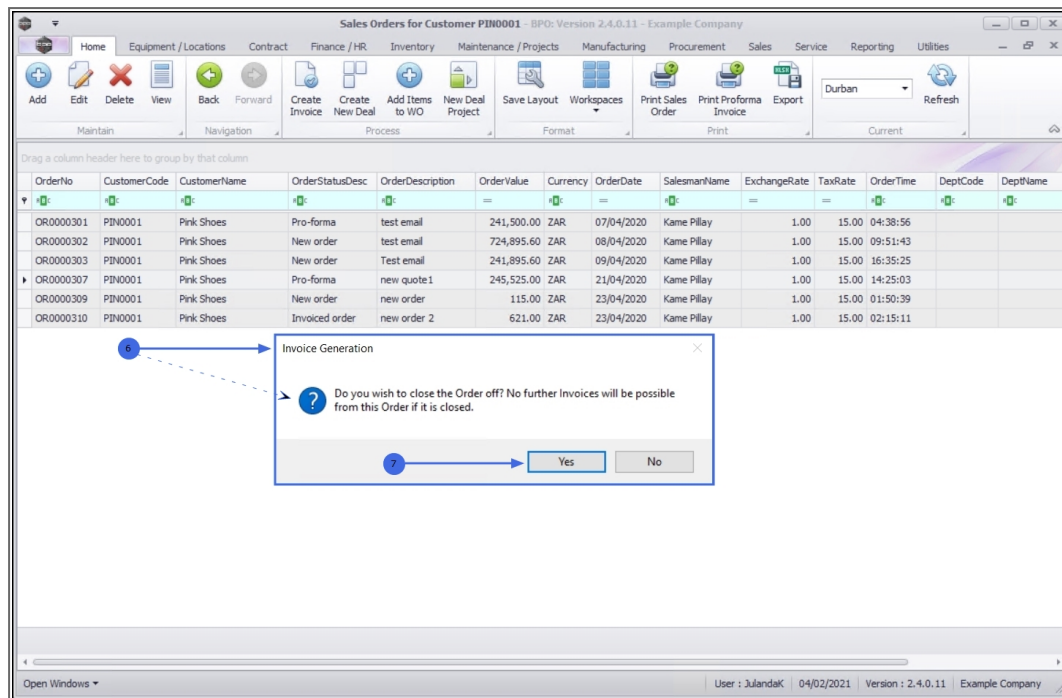
FIRST INVOICE GENERATION MESSAGE

4. The first **Invoice Generation** message will prompt you;
 - Do you want to convert order no. [order number], for customer, [customer code], to an invoice?
5. Click on **Yes**, if you are certain about your selection.



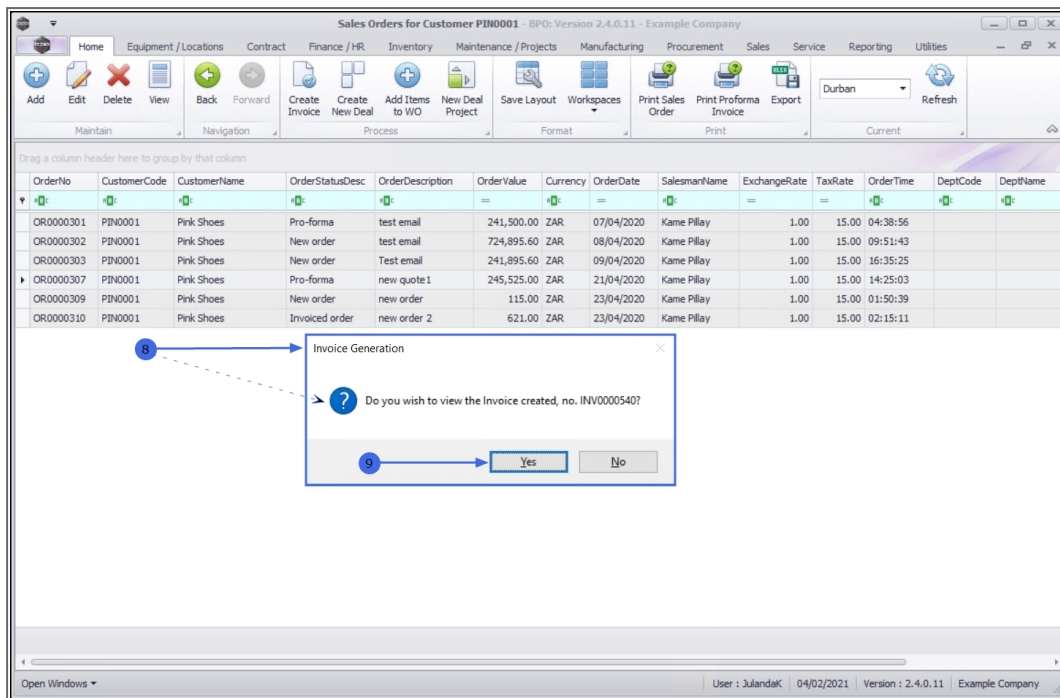
SECOND INVOICE GENERATION MESSAGE

6. The second **Invoice Generation** message will prompt you;
 - **Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.**
7. Click on **Yes**, if you are certain about your selection.



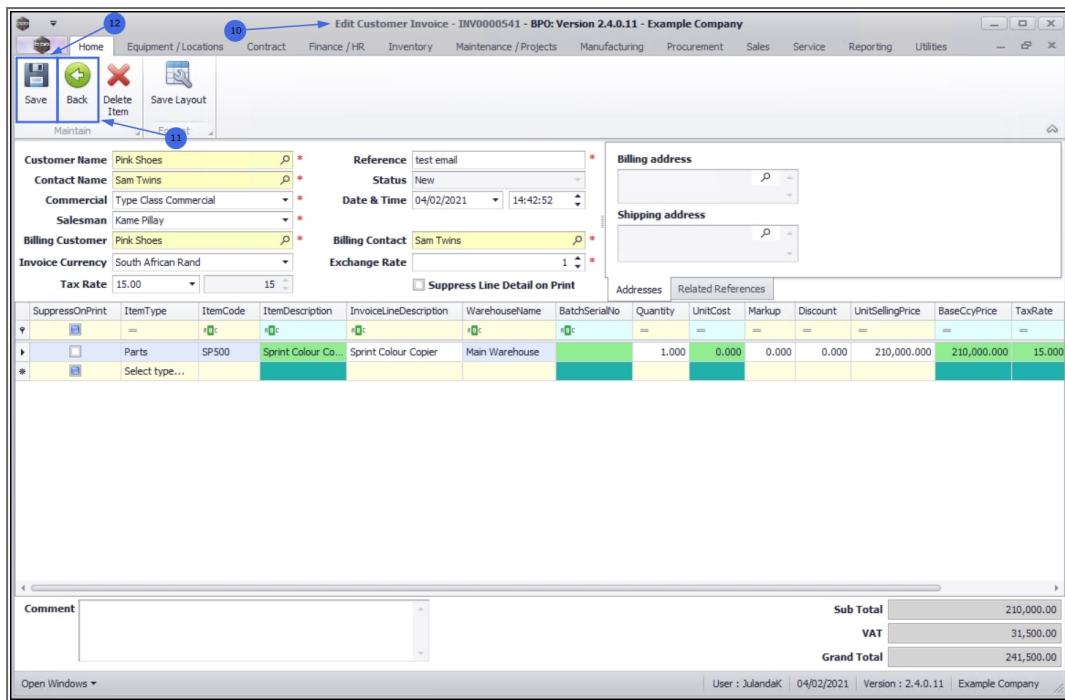
THIRD INVOICE GENERATION MESSAGE

8. When you receive the third **Invoice Generation** message requesting;
 - **Do you wish to view the Invoice created, no [invoice number]?**
9. Click on **Yes** to view the Invoice.
 - Click on **No** to return to the **Sales Orders for Customer** screen.



10. The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.
11. Click on **Back** to return to the **Sales Orders for Customer** screen, or
12. Click on **Save** if you have made changes to the Invoice.

For a detailed handling of this topic refer to [Orders - Convert to Sales Invoice](#)

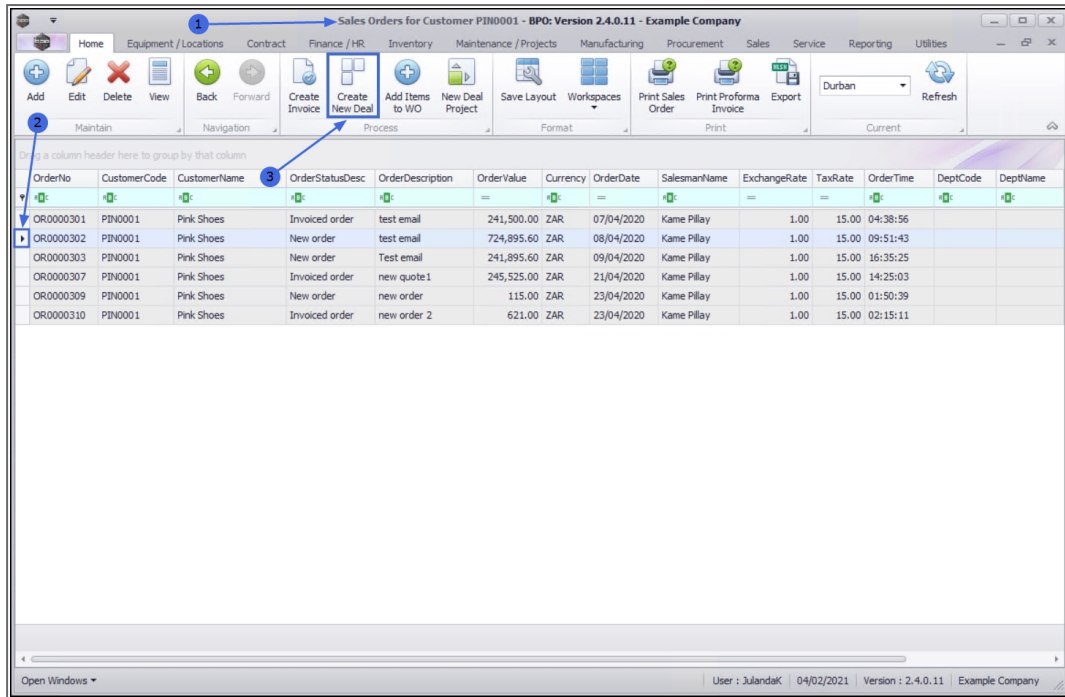


CREATE NEW DEAL

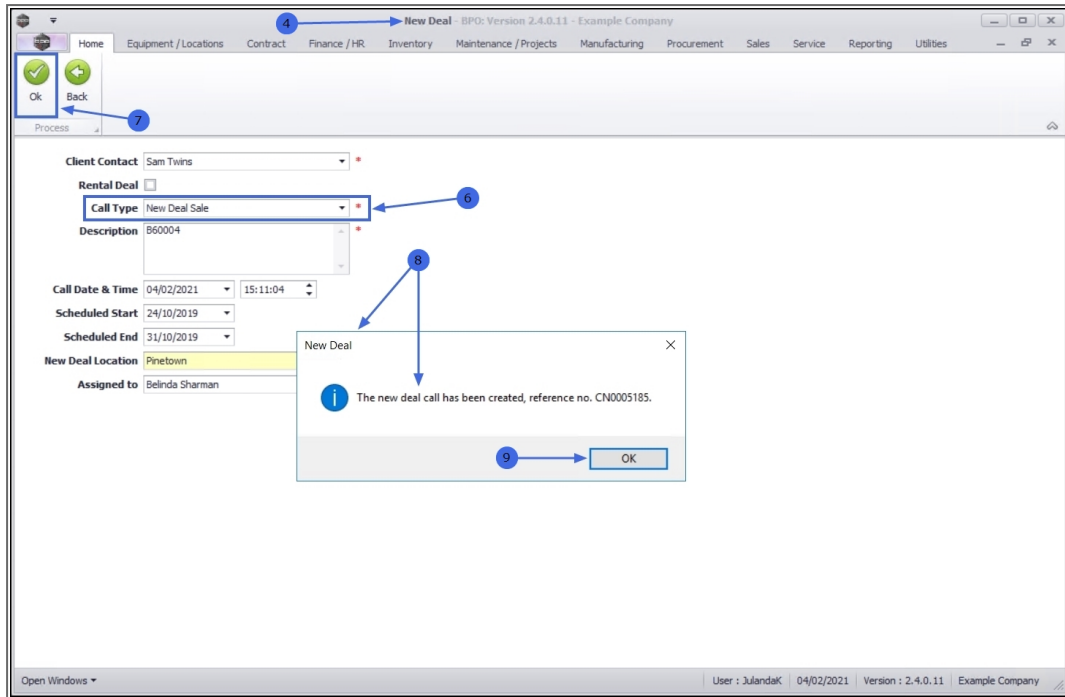
1. From the **Sales Orders for Customer** [Customer Code] screen,
2. Select the **row** of the Order you wish to create a New Deal for.
3. Click on **Create New Deal**.



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



4. "The New Deal screen will be displayed." on page 3
5. Complete the New Deal information as required.
6. The **Call Type** field enables you to distinguish if this order is a New Deal Sale or New Deal Rental.
7. When you have completed the new deal information, click on **OK**.
8. When you receive the **New Deal** message to confirm that;
 - **The new deal call has been created, reference no. [reference number]**
9. Click on **OK**.



10. You will return to the **Sales Orders** screen.
11. The **OrderStatusDesc** will have updated to **Invoiced order**.

For a detailed handling of this topic refer to [Orders - Convert to New Deal Sale / Rental](#)

ADD ITEMS TO WORK ORDER

The Add Items to WO function is only valid where the Customer Order has been linked to an existing Work Order.

1. From the **Sales Orders for Customer** [Customer Code] screen,
2. Select the **row** of the Sales Order you wish to add items to.
3. Click on **Add Items to WO**.

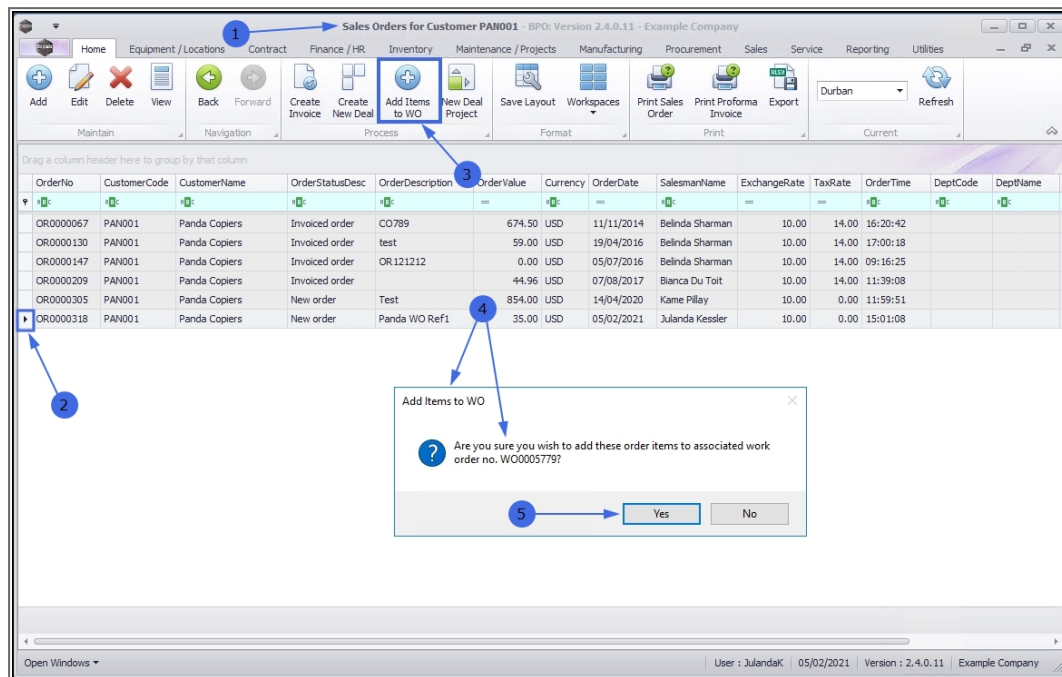


Short cut key: Right click to display the **All groups** menu list. Click on **Add Items**.

4. When you receive the **Add Items to WO** message to confirm;

- Are you sure you wish to add these order items to associated work order no []?

5. If you are certain about your selection, click on **Yes**.



6. You will return to the **Sales Orders for Customer** listing screen.
7. The Work Order items will have been added to the Sales Order.
8. The OrderStatusDesc field for the Order, will have changed from New Order to **Invoiced order**.

For a detailed handling of this topic refer to [Orders - Add Items to Work Order](#)

Sales Orders for Customer PAN001 - BPO: Version 2.4.0.11 - Example Company

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000067	PAN001	Panda Copiers	Invoiced order	CO789	674.50	USD	11/11/2014	Belinda Sharman	10.00	14.00	16:20:42		
OR0000130	PAN001	Panda Copiers	Invoiced order	test	59.00	USD	19/04/2016	Belinda Sharman	10.00	14.00	17:00:18		
OR0000147	PAN001	Panda Copiers	Invoiced order	OR121212	0.00	USD	05/07/2016	Belinda Sharman	10.00	14.00	09:16:25		
OR0000209	PAN001	Panda Copiers	Invoiced order		44.96	USD	07/08/2017	Bianca Du Toit	10.00	14.00	11:39:08		
OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
OR0000318	PAN001	Panda Copiers	Invoiced order	Panda WO Ref1	35.00	USD	05/02/2021	Julanda Kessler	10.00	0.00	15:01:08		

NEW DEAL PROJECT

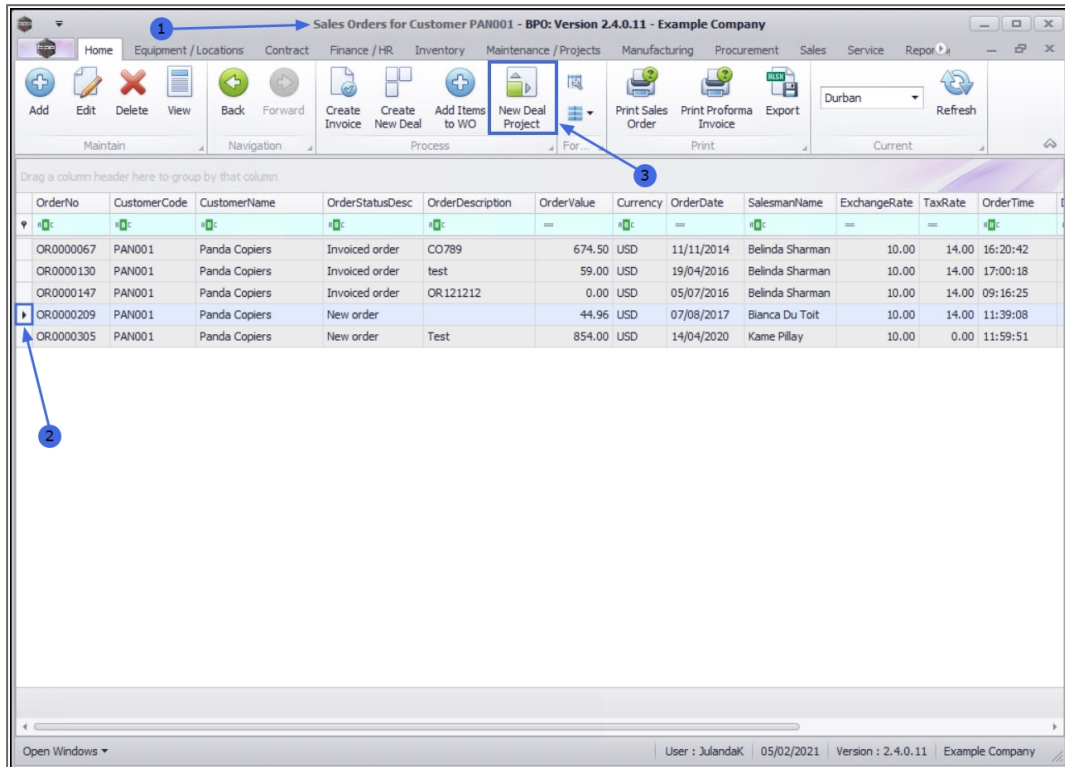
- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

1. From the **Sales Orders for Customer [Customer Code]** screen,
2. Click on the **row** of the **Sales Order** you wish to convert to a New Deal Project.

3. Click on **New Deal Project**.



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



4. "The New Deal Project screen will be displayed. " on page 3

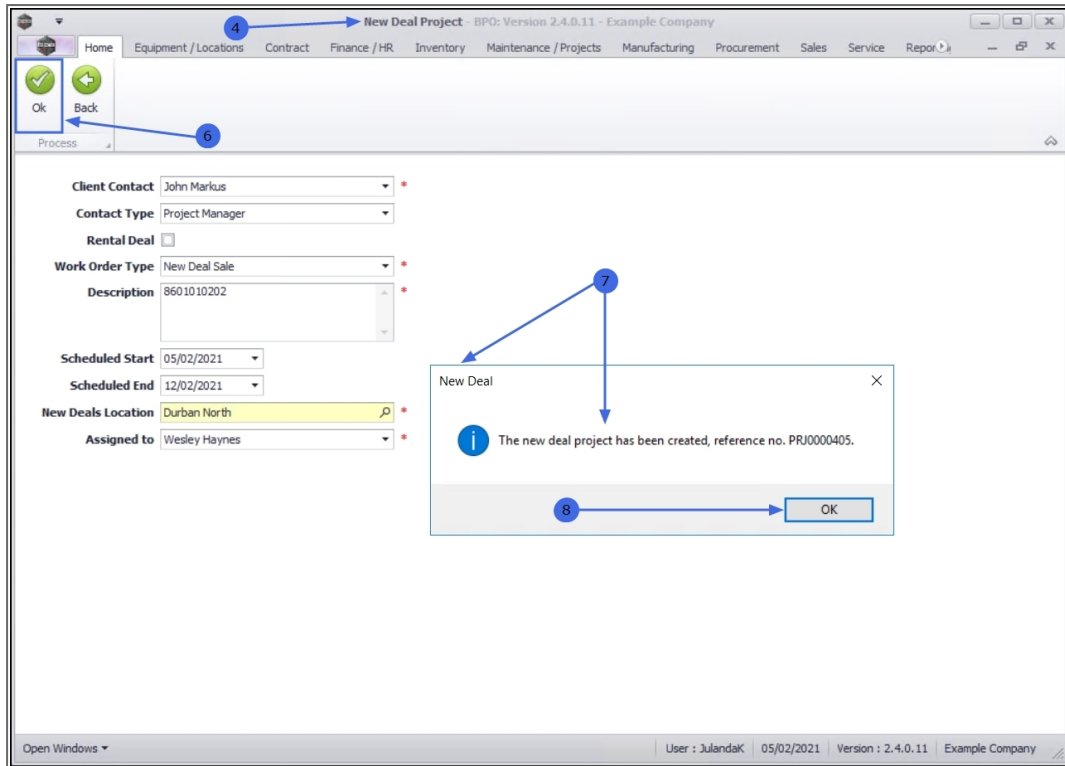
5. Complete the New Deal Project Details as required,

6. Click on **OK** to save the new deal details.

7. When you receive the **New Deal** message to confirm that;

- The new deal project has been created, reference no. [reference number]

8. Click on **OK**.



9. You will return to the **Sales Order** screen.

10. The **OrderStatusDesc** will have updated to **Invoiced order**.

For a detailed handling of this topic refer to [Orders - Convert to New Deal Project](#)

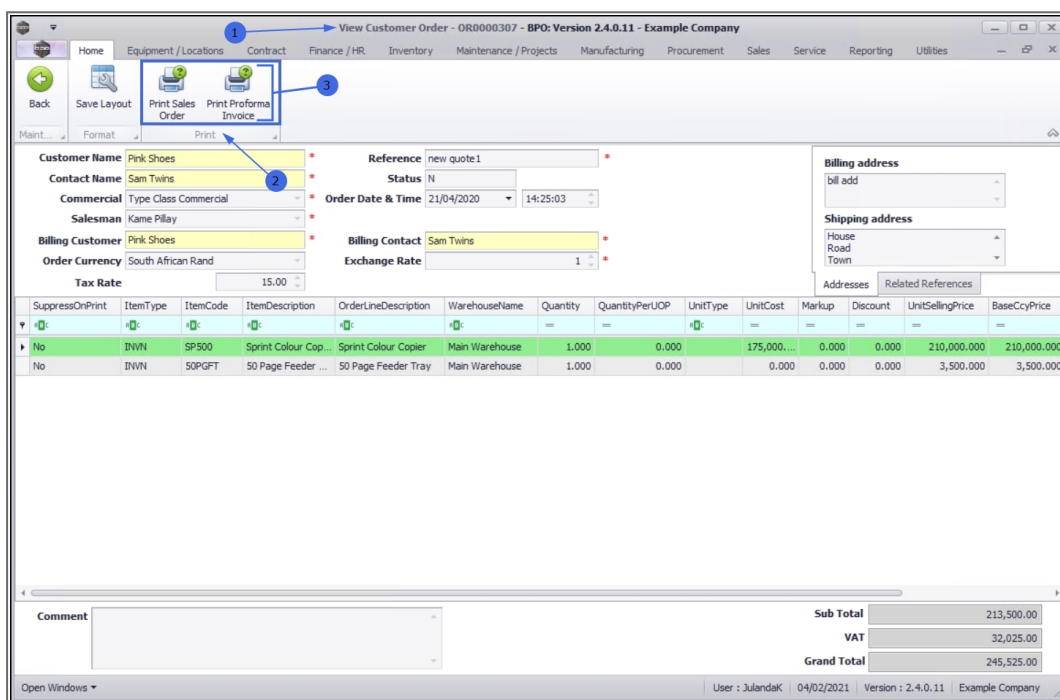
PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to Print a Sales Order and / or Print a Proforma Invoice from the;

- Sales Orders listing screen
- Add Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the proforma invoice will be printed from the View Customer Order - OR[Order Number] screen. The same procedure can be followed from any of the above mentioned screens.

1. From the **View Customer Order - OR[Order Number]** screen,
2. Click the print option that you require.
 - Print Sales Order
 - Print Proforma Invoice
3. The example has **Print Proforma Invoice** selected.



Customer Name Pink Shoes
Contact Name Sam Twins
Commercial Type Class Commercial
Salesman Kame Pillay
Billing Customer Pink Shoes
Order Currency South African Rand
Tax Rate 15.00

Reference new quote 1
Status N
Order Date & Time 21/04/2020 14:25:03
Billing Contact Sam Twins
Exchange Rate 1

Billing address
 bill add
Shipping address
 House
 Road
 Town

SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
No	INVN	SP500	Sprint Colour Cop...	Sprint Colour Copier	Main Warehouse	1.000	0.000		175,000.000	0.000	0.000	210,000.000	210,000.000
No	INVN	50PGFT	50 Page Feeder ...	50 Page Feeder Tray	Main Warehouse	1.000	0.000		0.000	0.000	0.000	3,500.000	3,500.000

Sub Total 213,500.00
VAT 32,025.00
Grand Total 245,525.00

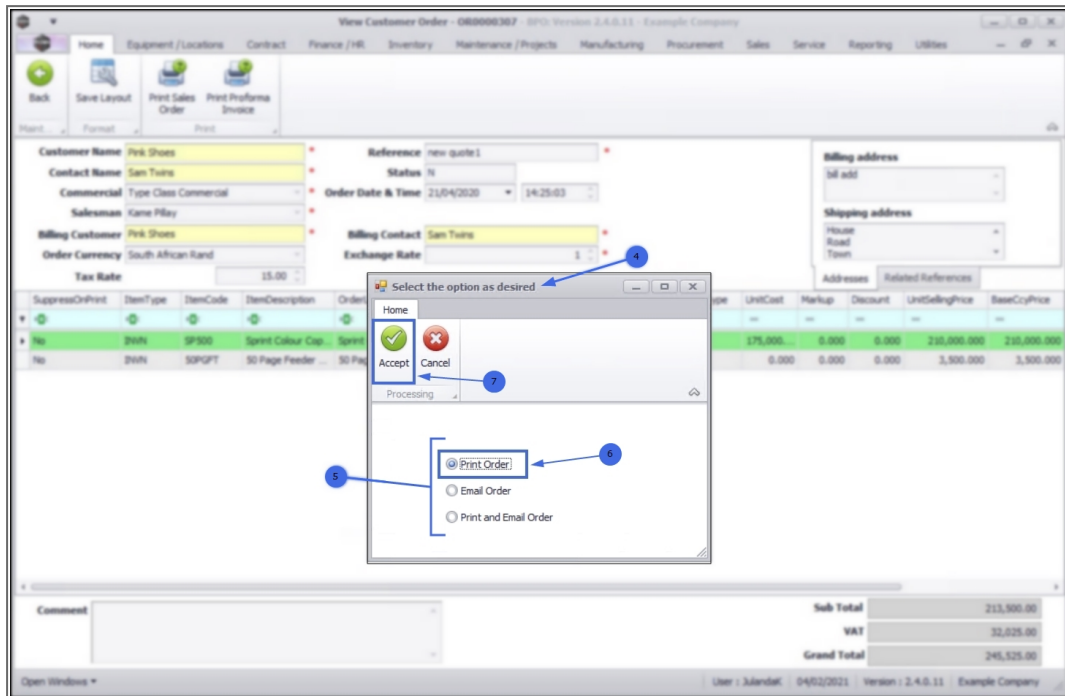
User : JulandaK 04/02/2021 Version : 2.4.0.11 Example Company

4. The **Select the option as desired** message will display, prompting for your response.
5. Click on the **radio button** to select to either **Print Order**, **Email Order** or **Print and Email Order**.



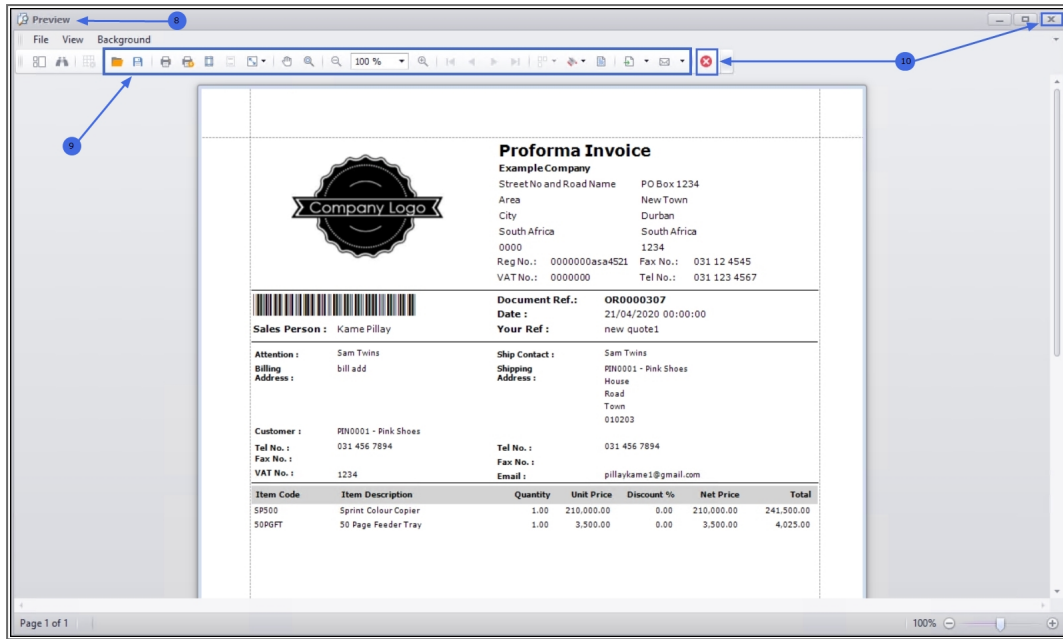
When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server and not from MS Outlook.

6. The example has **Print Order** selected.
7. Click on **Accept** to proceed.



8. The Sales Order and/or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
9. You can make cosmetic changes to the document, as well as **Save, Print, Export, Add a Watermark** or **Email** the Sales Order or Proforma Invoice.
10. Click on **Close** to return to the **Sales Quotes for Customer** screen.

For a detailed handling of this topic refer to [Orders - Print Sales Order](#) or [Orders - Print Proforma Invoice](#)



Proforma Invoice

Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 00000000asa4521 Fax No.: 031 12 4545
 VAT No.: 00000000 Tel No.: 031 123 4567

Document Ref.: OR0000307
Date: 21/04/2020 00:00:00
Your Ref: new quote1

Sales Person: Kame Pillay

Attention: Sam Twins
Billing Address: bill add

Ship Contact: Sam Twins
Shipping Address: RHN0001 - Pink Shoes House Road Town 010203

Customer: RHN0001 - Pink Shoes
Tel No.: 031 456 7894
Fax No.: 1234
VAT No.: 1234

Tel No.: 031 456 7894
Fax No.: pillaykame1@gmail.com

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
SP500	Sprint Colour Copier	1.00	210,000.00	0.00	210,000.00	241,500.00
SP500	50 Page Feeder Tray	1.00	3,500.00	0.00	3,500.00	4,025.00

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