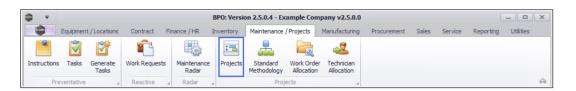


PROJECTS

PROJECTS - SALES ORDERS

Ribbon Access: Maintenance / Projects > Projects



- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* where the project can be located.
 - The example has *Durban* selected.
- 3. Ensure that the *Status* has been set to *Open*.
- 4. Click on the *row* of the *project* you wish to create a sales order for.
- 5. Click on the *Orders* tile.

dd Edit	Equipmen Save La Workspa	yout	Apply P	ract Finance / HR Inver roject Methodology (Project Baseline Close Project	💰 Emp	Maintenance / F loyee Time ect Time gress Report	Print Delivery Note	Export	ocurement an - v ojects -	Refresh Re	rice Reporting	Utilities	- 8	
aintenance 🔒	Format		4	Processing 🖌	Ana	alysis "	Print	4	Current	3 Rej	ports "			_
iks	4	Listin	g Hierarchy											
ter text to search	· 2													
For Contract		Pro	jectRef •	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptName		
		9 10		10:	10c	REC.	=	R C	-0:	10:	-0-	* B C		
		+	PRJ0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt			
Time Review		ŧ	PRJ0000411	Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt			
This is the second seco		+	PRJ0000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt			
		Ŧ	PRJ0000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt			
		٠	PRJ0000407	OSU1001	0	Open	31/03/2021	Julanda Kessler	No	OFF001	Office Supplies			
4	Ĩ	Ŧ	PR.J0000406	B60004	0	Open	31/03/2021	Steven Cooper	No	BIG0001	Big Bargains			
Processing		÷	PR.J0000405	8601010202	0	Open	12/02/2021	Wesley Haynes	No	PAN001	Panda Copiers			
rocessing	5	Ŧ	PRJ0000404	TT041 - Bi-annually, Mono 10	0	Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Techno			
Ouotes		÷	PRJ0000403	TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt			
	/	•	PRJ0000402	test	0	Open	22/05/2020	Bianca Du Toit	No	DER001	Derton / Techno			
/		÷	PRJ0000401	Implementation BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes					
Orders		Ŧ	PR.J0000400	Testing BPO2	0	Open	18/01/2019	Bianca Du Toit	No					
Orders		Ŧ	PR.J0000399	Developmemnt BPO2	0	Open	16/01/2019	Bianca Du Toit	Yes					
		Ŧ	PRJ0000398	Design BPO2	0	Open	14/01/2019	Bianca Du Toit	Yes					
		Ŧ	PRJ0000397	Specification BPO2	0	Open	12/01/2019	Bianca Du Toit	Yes					
Invoices		+	PRJ0000396	Test BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes					
		+	PRJ0000395	BPO v2.2.0.1 Test Cycle	0	Open	08/02/2019	Bianca Du Toit	No					
		Ŧ	PRJ0000394	1234 - Test ctrt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt			
Credit Notes		Ŧ	PRJ0000393	NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt			
		Ŧ	PRJ0000392	credit validation check	0	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies			
		+	PRJ0000391	test new project	0	Open	22/08/2018	Ben Johnson	No					



 The Sales Orders for Project PRJ[project code] screen will be displayed.

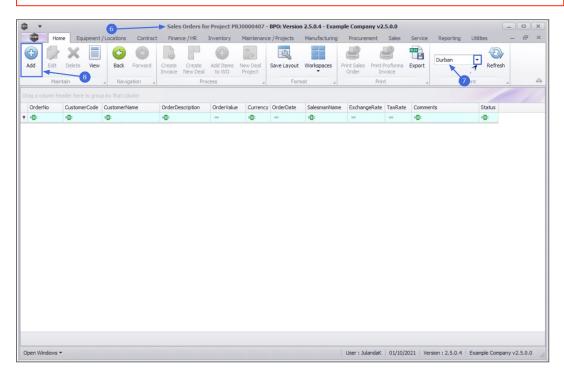
The *Site* from the Customer Listing screen will not automatically pull through to the *Sales Orders for Project* screen.

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

CREATE SALES ORDER

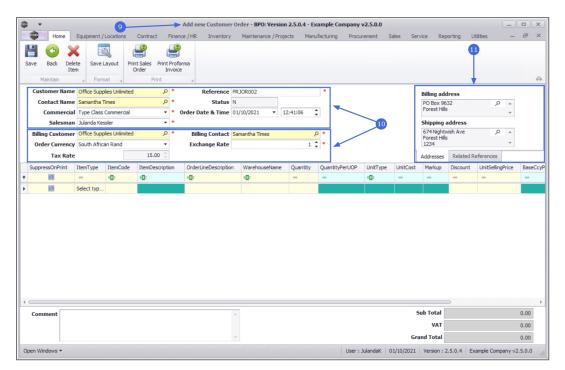
8. Click on **Add**.

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





- 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.



RELATED REFERENCES

- 12. Click on the *Related References* tab to link the reference information for the customer Order.
 - The Project References field will be auto linked with the selected Project Reference Number.



LINE ITEMS AND COMMENTS

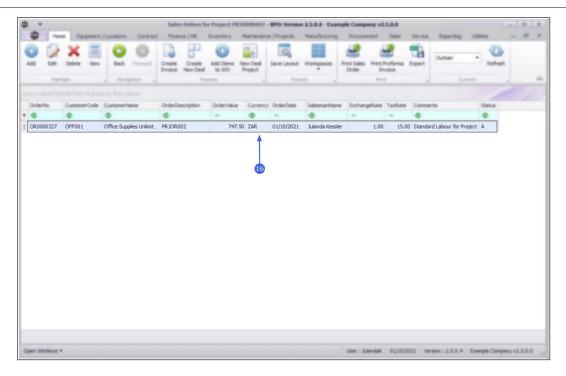
- 13. "Add Sales Order Items" on page 11 as required.
- 14. Click in the *Comments text box* to type a comment related to the Order.
- 15. Click on *Save* to save the customer Order.

۰.						Add new Customer									_	- 2	×
Save	Home Back Dele Haintain	te Savel	Layout Prin	nt Sales Print	Proform	e / HR Inventory	Maintenance / P	rojects Man	ufacturing	Procure	ement S	iales Ser			Juliues –		\$
Bill	stomer Name Contact Name Commercial Salesman ing Customer rder Currency Tax Rate	Samantha T Type Class Julanda Kes Office Supp	Times Commercial ssler olies Unlimited	م • •	* * 0	Reference Status rder Date & Time Billing Contact Exchange Rate	N 01/10/2021 -		• • • • •	Q			Reference Serial No Call Refe Contract Location Project R Addresses	rence No leference	PRJ0000407 References		-0
Supp		ItemType	ItemCode	ItemDescripti	n	OrderLineDescription			Quantity	PerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice		eCcyPi
9		Labour	DES	n 🛛 c Design		I Design	R C	- 1.00	-	0.000	n 🗖 C	0.000	0.000	0.00	- 0 650.0	=	65
*		Select typ	DES	Design		Design		1.00	,	0.000		0.000	0.000	0.00	7 030.0	00	0.
- Cor	nment						1	•				5	ub Total			650.00	
								-14				612	VAT and Total			97.50 747.50	
Open V	Vindows 🕶									User : Ju	ulandaK (01/10/2021		2.5.0.4 E	xample Company		

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

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





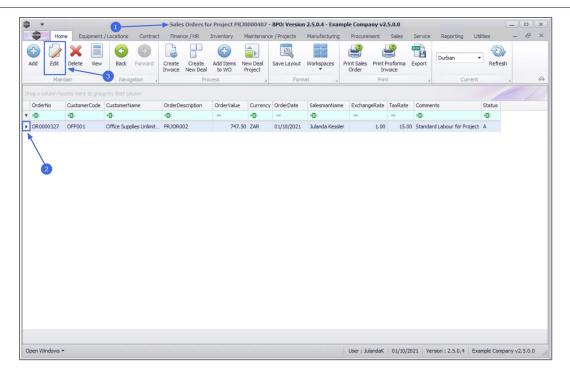
EDIT SALES ORDER

Note that Sales Orders that have already been invoiced will <u>not</u> be available for editing.

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

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





- 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



4	Home	Equipment /	Locations	Contract Fi	inance / HR Inventory	Maintenance / Pro	jects Manu	facturing	Procure	ement S	ales Ser	vice Rep	orting Ut	ilities —	日)
ŀ	1 🕜 🗙		3	e	3										
Sa	ve Back Delet				roforma										
-	Maintain	. Forn	nat "	Print											
Γ	Customer Name	Office Supp	lies Unlimited	ק ו	Reference	PRJOR002	_	•			Г	Billing add	tress		
	Contact Name	Samantha T	Times	م	* Status	N		-				PO Box 96	32	⊾ م	
	Commercial	Type Class	Commercial	•	* Order Date & Time	01/10/2021 -	12:41:06					Forest Hills	3	+	
	Salesman	Julanda Ke	ssler	-	•					5		Shipping a	address		
	Billing Customer	Office Supp	lies Unlimited	ק ו	* Billing Contact	Samantha Times	۶	*		1.1.1	· • .	674 Nightv Forest Hills		* ٩	
	Order Currency	South Afric	an Rand	-	Exchange Rate		1	*				1234		Ψ.	
	Tax Rate			15.00 🤤								Addresses	Related Re	eferences	
S	SuppressOnPrint	ItemType	ItemCode	ItemDescriptio	n OrderLineDescription	WarehouseName	Quantity	Quantit	yPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseC
		-	#DC	n 🗖 C	n 🗖 c	4 0 4	-	-		n O C	-	-	-	-	-
		Labour	DES	Design	Design		1.000		0.000		0.000	0.000	0.000	650.000	
4		Sub Contr	DEL	Delivery Fee	Delivery Fee		1.000		0.000		0.000			500.000	_
		Expenses	TOLL	Toll	Toll		2.000		0.000		0.000			35.000	
		Parts	SP2020		Co SP2020 Sprint Colou		1.000		0.000	ea	0.000			22,000.000	
		Travel	100		ee Travel not exceeding		1.000		0.000		0.000			350.000	
		Warranty	24MSW	24 Month Supp Installation Fe		I	1.000		0.000		0.000			600.000	
		Internal S Select typ	INST	Installation Fe	e Installation Fee		1.000		0.000		0.000	0.000	0.000	1,200.000	1
		select typ													
6		click in		em Line, Type column ailable row									_		
	Comment Standa	rd Labour fo	or Project			*					s	ub Total		25,3	70.00
												VAT		3,80	05.50
											6	nd Total			75.50

DELETE SALES ORDER

Note that Orders that have already been invoiced will <u>not</u> be available for deletion.

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

Ø

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

- 4. The *Confirm delete Order* message will display;
 - Are you sure you want to delete this Order?
- 5. Click on Yes.



Image: Section of the section of th	Image: Confirm delete Order Image: Confirm delete Order	•				0-		Sale:	s Orders fo	or Project PRJ0	0000407 -	BPO: Version	1 2.5.0.4 - Exar	nple Company	v2.5.							
dd Edit View Back Forward Orcate	udd Edit Vew Back Forward Orcate Orcate Orcate Maintan Orcate Orcate Orcate Nove Levout Workspaces Print Sales Print	-	Home	Equ	ipment /	Locations	Contract	Finan	ice / HR	Inventory N	Aaintenance	e / Projects	Manufacturing	Procuremen	it s	Sales	Service	Reporting	Utilit	ies	- 4	я х
Maintain Order New Deal to WO Project Format Order Invoice Big a colume Header Here to group by that column Order/Date Format Print Current Order No OutsomerOade CustomerName Order/Date SalesmanName EvchangeRate TasRate Comments Oic OR Or Order Order Order Oic	Maintain Order New Deal to WO Project Format Order Invoice Big a column Header Hare to group by that column Order/Value Currency Order/Date SalesmanName ExchangeRate Taskate Currents Other Order No OutsomerOod CustomerOod CustomerOod Order/Date SalesmanName ExchangeRate Taskate Comments Status OR0000327 OFF001 Office Supplies Unlimit PRJOR002 29,175.50 ZAR 01/10/2021 Jalanda Kessler 1.00 15.00 Standard Labour for Project A OR0000323 OFF001 Office Supplies Unlimit PRJOR002 0.00 ZAR 01/10/2021 Jalanda Kessler 1.00 15.00 Status O Office Supplies Unlimit PRJOR002 0.00 ZAR 01/10/2021 Jalanda Kessler 1.00 15.00 A	G		×		0	0			9				e				Durban	•	2		
1 1	Control Control <t< td=""><td>Add Ed</td><td></td><td>Delete</td><td>view</td><td></td><td>Forward</td><td></td><td></td><td></td><td></td><td>Save Layout</td><td>workspaces</td><td></td><td></td><td></td><td>export</td><td></td><td></td><td>Refresh</td><td></td><td></td></t<>	Add Ed		Delete	view		Forward					Save Layout	workspaces				export			Refresh		
OrderNo CustomerCode CustomerName OrderDescription OrderValue Currency OrderDate SalesmanName ExchangeRate TaxRate Comments Status 10:	OrderNo CustomerCode CustomerName OrderDescription OrderValue Currency OrderDate SalesmanName ExchangeRate TasRate Comments Status n0:		Mainta	ain		. 3	gation 🦼		Pro	icess		Form	at 4		Print		4	Cu	urrent			6
ID: ID: <td>ID: ID: ID:<td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td>	ID: ID: <td></td>																					
ID: ID: <td>ID: ID: ID:<td>OrderNo</td><td>0</td><td>Custome</td><td>Code</td><td>Customer</td><td>Name</td><td>OrderDe</td><td>scription</td><td>OrderValue</td><td>Currency</td><td>OrderDate</td><td>SalesmanNam</td><td>e ExchangeR</td><td>ate T</td><td>axRate</td><td>Commer</td><td>nts</td><td>3</td><td>Status</td><td>-</td><td></td></td>	ID: ID: <td>OrderNo</td> <td>0</td> <td>Custome</td> <td>Code</td> <td>Customer</td> <td>Name</td> <td>OrderDe</td> <td>scription</td> <td>OrderValue</td> <td>Currency</td> <td>OrderDate</td> <td>SalesmanNam</td> <td>e ExchangeR</td> <td>ate T</td> <td>axRate</td> <td>Commer</td> <td>nts</td> <td>3</td> <td>Status</td> <td>-</td> <td></td>	OrderNo	0	Custome	Code	Customer	Name	OrderDe	scription	OrderValue	Currency	OrderDate	SalesmanNam	e ExchangeR	ate T	axRate	Commer	nts	3	Status	-	
OR00000328 OFF001 Office Supplies Unlimit PRJOR002 0.00 ZAR 01/10/2021 Julanda Kessler 1.00 15.00 A 2 Confirm delete Order 4 4 4 4 4	OR0000328 OFF001 Office Supplies Unlimit PRJOR002 0.00 ZAR 01/10/2021 Julanda Kessler 1.00 15.00 A 2 2 Confirm delete Order 4 X <td>n C</td> <td></td> <td>-</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	n C												-								
2 Confirm delete Order 4 ? Are you sure you want to delete this Order?	2 Confirm delete Order 4 ? Are you sure you want to delete this Order?	OR00003	27 (OFF001		Office Sup	plies Unlimit	PRJORO	02	29,175.50	ZAR	01/10/2021	Julanda Kessl	er 1	.00	15.00	Standar	d Labour for P	roject	A		
Confirm delete Order Are you sure you want to delete this Order?	Confirm delete Order Are you sure you want to delete this Order?	OR00003	28 0	OFF001		Office Sup	plies Unlimit	PRJORO	02	0.00	ZAR	01/10/2021	Julanda Kessl	er 1	.00	15.00				A		
		2	2						Cor	_		Ľ	4	×								
										? Are you	sure you			×]								
			2							? Are you	sure you			×]								
										? Are you	sure you			×								

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 <u>any</u> 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*.



٥	Ŧ		- (1			Sales	orderare	a mojecti to												
1	Hom	ne Equipm	ent / Loca	ations	Contract	Finan	ice / HR	Inventory	Maintenance	e / Projects	Manufacturing	Procure	ment	Sales	Service	Reporting	Utilit	es	- 8	e x
A	dd Edit		ew	G Back	Forward	Create	Create New Deal	Add Items N to WO	ew Deal Project	Save Layout	Workspaces	Print Sales Order			Export	Durban	•	Refresh		
	3 Main	Itain	_	Naviga	tion	ATTOICE.		icess	, oject	Form	at	order	Print			0	urrent			6
ra	-	ader here to g	roup by						-									1		
(OrderNo	CustomerCo	de Cust	tomerNa	me	OrderDe	escription	OrderValue	Currency	OrderDate	SalesmanNam	e Exchan	geRate	TaxRate	Commer	nts	-	Status		
	n 🗖 c	• B ¢	* E ¢			#OC		-	n 🖬 c	-	4 0 0	-		-	#Ec			0		
	OR0000327	OFF001	Offic	e Suppli	es Unlimit	PRJORO	02	29,175.50	ZAR	01/10/2021	Julanda Kessle	er	1.00	15.00	Standar	d Labour for F	Project	4		
	2																			
	2																			
	0																			

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

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

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



Co	Save Layo Format	5 Ord	ler Inv Print	roforma roice										
Co		Office Sup												
	ontact Name		plies Unlimited	•	Reference	RJOR002		•			Billing add	recc		
		Samantha	Times	•	Status	4					PO Box 96		*	
	Commercial	Type Class	Commercial	- *	Order Date & Time	01/10/2021 -	2:41:06				Forest Hills		-	
	Salesman	Julanda Ke	ssler	÷							Shipping a	ddress		
Billin	ng Customer	Office Sup	plies Unlimited	•	Billing Contact	Gamantha Times		•			674 Nightw Forest Hills		*	
Ord	der Currency	South Afric	an Rand	~	Exchange Rate		1 🗘				1234		*	
	Tax Rate			15.00 🤤].	Addresses	Related Re	ferences	
Suppre	ressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCo
n C		R I C	n 🗖 c	8 🖬 c	n 🗖 c	A C	-	-	R O C	-	-	-	-	-
No		CRFT	DES	Design	Design		1.000	0.000		0.000	0.000	0.000	650.000	
No		CTRT	DEL	Delivery Fee	Delivery Fee		1.000	0.000		0.000	0.000	0.000	500.000	
No		EXPS	TOLL	Toll	Toll		2.000	0.000		0.000	0.000	0.000	35.000	
No		INVN	SP2020		SP2020 Sprint Colour		1.000	0.000	ea	0.000	0.000	0.000	22,000.000	22
No		TRVL	100		Travel not exceeding		1.000	0.000		0.000	0.000	0.000	350.000	
No		WARR	24MSW		24 Month Supplier W		1.000	0.000		0.000	0.000	0.000	600.000	
No		SERV	INST	Installation Fee	Installation Fee					0.000	0.000	0.000	1,200.000	1,

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 any downstream process
 documents related to the selected Sales Order, e.g. the linked
 Sales Invoice or the related new deal Call.
- The *Back* navigation button will transport you back to the *Customer Listing* screen.



Projects - Sales Orders

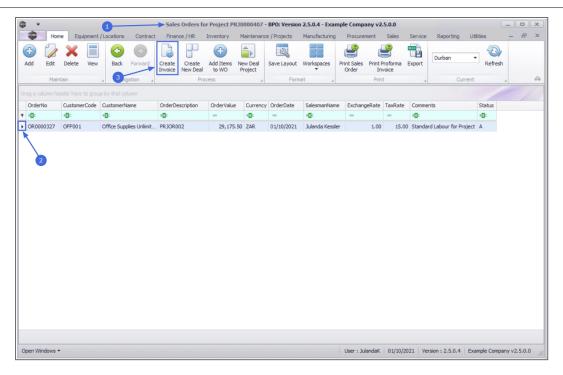
• =						Sales Orders fo	or Project PRJ	0000408 ·	- BPO: Versio	n 2.5.0.4 - Exar	mple Company v	2.5.0.0				_ 0	x
-	Home	Equipm	ient / Lo	cations	Contract	Finance / HR	Inventory I	Maintenanc	e / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	×
Add	Edit		iew	Back	Forward	Create Create	Add Items N	ew Deal	Save Layout	Workspaces		Proforma	Export	Durban	• Refrest	1	
	Mainta	in		_			to WO I	Project	Form	nat	Order In Pri	ivoice		Curre	ot		
Drag a co		ler here to g	aroup by		(\Rightarrow)			4	T QUI	iot a			*	cure			
Ordert	lo	CustomerCo	de Cu	istor		-	OrderValue	Currency	/ OrderDate	SalesmanNam	e ExchangeRate	TaxRate	Comme	nts	Status		
9 BCC		0:	-0		Back	Forward	-	REC	-	* 0 ¢	=	-	R O C		- C -		
• OR000	0325	OFF001	Of	fice			3,450.00	ZAR	23/09/2021	Julanda Kessl	er 1.00	15.00	Project	Quote for Call out	A :		

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*.





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

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



4	Ŧ							Sale	s Orders fo	or Project PR	0000407	- BPO: Version	n 2.5.0.4 - Exa	mple Compa	any v2	.5.0.0				_ D X
	-	Home	Equip	oment /	Locatio	ns	Contract	Finar	ice / HR	Inventory	Maintenand	e / Projects	Manufacturing	Procurer	ment	Sales	Service	Reporting	Utilities	_ & ×
	Add	Edit	X Delete	View	Bac	-	Forward	Create Invoice	Create New Deal		wew Deal Project	Save Layout	Workspaces	Print Sales Order			Export	Durban	• Refre	sh
		Mainta	ain		. Ni	avigat	ion 🖌		Pro	icess	4	Form	nat "		Prin	t	4	Curre	ent	4
D																				
	OrderN	0	Customer	Code	Custom	erNam	ne	OrderDe	escription	OrderValue	Currence	/ OrderDate	SalesmanNar	ne Exchang	peRate	TaxRate	Comme	ents	Status	
۴	R O C		<u>ا</u>		* 0 ¢			R O C		-	R C	-	* C	-		-	REC		* 0 ¢	
•	OR000	0327	OFF001		Office S	upplie	es Unlimit	PRJORO	02	29,175.5	0 ZAR	01/10/2021	Julanda Kess	ler	1.00	15.00) Standa	rd Labour for Proj	ect A	
									? Do y Supp	ou want to co plies Unlimited	nvert order , to an inve	pice?	27, for custom	er, Office No]					
0	pen Win	dows 🕶												User : Jul	landaK	01/10/20	021 Ve	rsion : 2.5.0.4	Example Con	npany v2.5.0.0 //

- 6. The second *Invoice Generation* message will confirm;
 - 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.

	Ŧ				Sales On	rders for	Project PRJ	0000407 -		2.5.0.4 - Exan		iny v2.					_	
-	Hom	e Equipment	/Locations	Contract	Finance /	/HR Ir	nventory I	Maintenance	e / Projects	Manufacturing	Procurer	nent	Sales	Service	Reporting	Utilities	-	. & x
Add	Edit	Delete View	Back	Forward		Dreate /	Add Items N to WO	lew Deal Project	Save Layout	Workspaces	Print Sales Order			Export	Durban	* R	Refresh	
	Maint	tain	. Navi	igation 🦼		Proce	ess		Form	at "		Print		4	CL	urrent	4	6
Orde	erNo	CustomerCode	Customer	Name	OrderDescrip	iption	OrderValue	Currency	OrderDate	SalesmanNam	e Exchang	eRate	TaxRate	Commer	nts	Stat	tus	
P BOC		*Oc	* 0 ¢		R C		-	R C	-	* C	-		-	R O C		8 0 0		
ORO	000327	OFF001	Office Sup	plies Unlimit	PRJOR002		29,175.50	ZAR	01/10/2021	Julanda Kessle	er	1.00	15.00	Standar	rd Labour for P	roject A		
					Invoice Ger	eneration	•		6			×						
						Do you w		the Order o closed.	6 off? No furthe	r Invoices will b		×						
						Do you w	wish to close t	the Order o closed.	off? No furthe	r Invoices will b	e possible No	×						
						Do you w	wish to close t	the Order of closed.	6 off? No furthe			×						
						Do you w	wish to close t	the Order o	6 off? No furthe			×						
						Do you w	wish to close t	the Order o	€ off? No furthe			×						



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

Home Equipme			or Project PROU	000407 -		1 2.5.0.4 - Exar		any v2.						
	nt / Locations Contract	t Finance / HR	Inventory N	laintenance	e / Projects	Manufacturing	Procure	ment	Sales	Service	Reporting	Utilities	-	8 x
Add Edit Delete Vie		Create Create	Add Items Ne	ew Deal Project	Save Layout	Workspaces	Print Sales Order			Export	Durban	• Refre	sh	
Maintain	Navigation	Pro	icess		Form	at ,		Print	1		Curr	rent		G
a column header here to gr													1	
	e CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanNam	e Exchance	eRate	TaxRate	Commer	nts	Status		/
*D: *D:	* 0 ¢	10c	-	R C	-	* 0 ¢	-		-	n 🖬 c		100		
OR0000327 OFF001	Office Supplies Unlimit.	PRJOR002	29,175.50	ZAR	01/10/2021	Julanda Kessle	er	1.00	15.00	Standar	rd Labour for Pro	piect A		
			neration -	t,	8	d no 101/0000	×							
			Do you wish to	view the l		d, no. INV0000	561?							

- 10. The *Edit Customer Invoice* screen will display. From here 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



	4 🕒 🕯	× 3														
Sa	we Back De	elete Save Lavo	ut													
		tem														
	Maintain	_ 11hat														6
Cı	istomer Name	Office Supplies Un	imited	Q	•	Reference	PRJOR002	1	*	Billing addres	s					
	Contact Name	Samantha Times		Q		Status	New			PO Box 9632		<u>ہ</u>				
	Commercial	Type Class Comme	rcial	•	•	Date & Time	01/10/202	1 - 14:30:20		Forest Hills		-				
	Salesman	Julanda Kessler		•	•				1	Shipping addr						
Bil	ling Customer	Office Supplies Un	imited	Q	* Bi	lling Contact	Samantha	Times		674 Nightwish / Forest Hills	Ave	<u>^</u>				
[nv	oice Currency	South African Ran	đ	•	Exe	change Rate				1234		-				
	Tax Rate	15.00 -		15 [‡]			Suppr	ess Line Detail on		Addresses Re	elated Refere	nces				-
1	SuppressOnPrint	ItemType	ItemCode	ItemDe	scription	InvoiceLineDe	scription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	Ta
2		=	R O C	REC		R C		8 0 c	* 0 0	=	-	-	-	-	-	=
,		Labour	DES	Design		Design				1.000	0.000	0.000	0.000	650.000	650.000	
		Expenses	TOLL	Toll		Tol				2.000	0.000	0.000	0.000	35.000	35.000)
		Parts	SP2020	SP2020	Sprint C	SP2020 Sprint	Colour	Main Warehouse		1.000	0.000	0.000	0.000	22,000.000	22,000.000)
		Travel	100	Travel r	not exce	Travel not exc	ceeding 1			1.000	0.000	0.000	0.000	350.000	350.000)
		Warranty	24MSW	24 Mont	th Suppli	24 Month Sup	plier War			1.000	0.000	0.000	0.000	600.000	600.000)
		Internal Service	INST	Installa	tion Fee	Installation Fe	e			1.000	0.000	0.000	0.000	1,200.000	1,200.000)
F		Select type														

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*.



-			Sales Orders for	r Project PRJ0	000406 -	BPO: Version	2.5.0.4 - Exan	nple Company v	2.5.0.0					
Home	e Equipment	/Locations Contract	Finance / HR	Inventory M	laintenanci	e / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	e x
Add Edit	Delete View	Back Forward	Create Invoice New Deal	Add Items Ne	w Deal	Save Layout	Workspaces	Print Sales Print		Export	Durban	• Refre	v	
Maint	ain	Navigatio	Proc		oject	Form	at	Pri			0	rrent		\Diamond
Drag a column hea			1100			- Com							1	
OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanNam	e ExchangeRate	TaxRate	Comme	nts	Status		
₽ # 	• • •	s 🛛 c	REC	-	n D C	-	NDC .	-	-	n a c		1 0 0		
• OR0000329	BIG0001	Big Bargains	PROJ406OR002	8,452.50	ZAR	01/10/2021	Julanda Kessle	er 1.00	15.00)		A		

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



	4		New Deal - BPO: \	/ersion 2.5.0.4 - Exa	ample Company v	/2.5.0.0					
Home Equ	ipment / Locations Contra	ct Finance / HR	Inventory Ma	intenance / Projects	Manufacturing	Procurement	Sales Se	ervice Reporting	Utilities	-	₽ x
Ok Back											
Process 4											~
Client Contact	Tarryn Snow CUSTOMER CO	NTACT 🔻 *	6								
Rental Deal			-								
	New Deal Sale	• •									
Description	PROJ406OR002	÷ *									
		-									
Call Date & Time	01/10/2021 • 14:52	46 🗘									
Scheduled Start	01/10/2021 -										
Scheduled End	08/10/2021 -										
New Deal Location	Durban North	* م	New Dea	al 🚽			×	(
Assigned to	Theo Peterson	- *									
				The new deal call	kas been created u	reference no. CN	0005274				
					nus been created, i		00052111				
					5		ОК				
Open Windows 🕶						User : JulandaK	01/10/2021	Version : 2.5.0.4	Example Cor	npany v2.5	i.0.0

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 [WO number]?
- 5. Click on Yes.



	Equipment	/Locations Contract	Finance / HR	Inventory M	laintenanci	e / Projects	Manufacturing	Procurement	Sales	Service	Reporting U	Jtilities		2 >
Add Edit	Delete View	Back Forward	Create Create	Add Items Ne		Save Layout	Workspaces		Proforma	Export	Durban	• Refres	h	
			Invoice New Deal		roject		*		voice					
Main	tain	A Navigation	Proc	less	A	Form	at 🦼	Prin	t	A	Current	t		6
			3											
OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	e ExchangeRate	TaxRate	Comme	nts	Status		
R O C	(D)	*Oc	ADC.	-	n 🖬 c	-	1 0 0	-	-	R O C		1 0 0		
OR0000325	OFF001	Office Supplies Unlimit	PRJ408/1	3,450.00	ZAR	23/09/2021	Julanda Kessle	er 1.00	15.00	Project	Quote for Call out	A		
OR0000330	HOP001	Hope Works (Pty) Ltd	PRJ408/003	1,886.00	ZAR	01/10/2021	Julanda Kessle	er 1.00	15.00			A		
				ou sure you wis		these order ite	ems to associate	× ed work						
			Are ye			these order ite	ems to associate							
			Are ye	ou sure you wis			ems to associate							
			Are ye	ou sure you wis				ed work						
			Are ye	ou sure you wis				ed work						
			Are ye	ou sure you wis				ed work						
			Are ye	ou sure you wis				ed work						
			Are ye	ou sure you wis				ed work						
			Are ye	ou sure you wis				ed work						

- 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 <u>OrderStatusDesc</u> 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

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,
- 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*.

-	Hom	e Ed	quipment ,	Locations	Contract	Finan	ce / HR	Inventory N	laintenanci	e / Projects	Manufacturing	Procurement	Sales	Service	Reporting U	Itilities	- 1	
C Add	Edit	X	View	G Back	Forward	Create	Create New Deal	Add Items No to WO	ew Deal Project	Save Layout	Workspaces F			Export	Durban	• Refr		
	Maini	tain		A Navig	ation 4			icess	4	For	3	Prin		4	Curren	t	4	6
	erNo			CustomerN		OrderDe	scription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TayPate	Commer	ate	Status	-	
		*Dc	ner coue	*D:	ane	RDC	sciptori		RDc	=	IC:	=	=	REC	15	status		
-	0000325	OFF00	1	-	lies Unlimit	-	1	3,450.00	-	23/09/2021	Julanda Kessler	1.00	15.00	-	Quote for Call out	A		
ORO	0000330	HOP00		Hope Work		PRJ408/		1,886.00	ZAR	01/10/2021	Julanda Kessler	1.00	15.00			A		
ORO	0000331	BEA00	1	Bearing and	Shoe	PRJ408/	BS001	908.50	ZAR	01/10/2021	Julanda Kessler	1.00	15.00			A		
	2																	
	2																	

- 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. PRJ

[project ref number]

8. Click on *OK*.



ф т	4	New	Deal Project	3PO: Version 2.5.0.4	- Example Compa	ny v2.5.0.0					
Home Equ	ipment / Locations Contrac	t Finance / HR	Inventory M	laintenance / Projects	Manufacturing	Procurement	Sales Se	rvice Reporting	Utilities	- 4	я х
Ok Back											
	6										_
Process 🖌											$\hat{\sim}$
Client Contact	John Bearing	-									
Contact Type	Project Manager	-									
Rental Deal											
Work Order Type	New Deal Sale	• *									
Description	PRJ408/BS001	× •									
Scheduled Start	01/10/2021 -										
Scheduled End											
New Deals Location		• م									
	Wesley Haynes	- +	New D	Deal 🚽	7			×			
, congrete to	rear fragmes				1						
				The new deal pr	oject has been crea	ited reference n	p. PRI0000413.				
					-,	,					
							-				
					8		OK				
Open Windows 🔻						User : JulandaK	01/10/2021	Version : 2.5.0.4	Example Cor	npany v2.5.	0.0 //

PRINT SALES ORDER / PRINT PROFORMA INVOICE

- 1. From the *Sales Orders for Project PRJ[project ref number]* screen,
- 2. Select the *row* of the Sales Order you wish to print.



- 3. Click on the print option you require.
 - Print Sales Order
 - Print Proforma Invoice
- 4. The example has *Print Sales Order* selected.

Hor	ne Equipment	Locations Contract	Finance / HR	Inventory N	laintenance	e / Projects	Manufacturing	Procurement	Sales	Service	Reporting Ut	tilities	- 8
Add Edit	Delete View	Back Forward	Create Create		ew Deal	Save Layout	Workspaces		Proforma E	Export	Durban	• Refresh	
Mair	Itain	Navigation		to wo P	Project	Form	4	Order In Prin			Current		
9	ader here to grou								-	-			
OrderNo	CustomerCode		OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TayData	Comme	ote	Status	1
	In Costoniel Code	*Dr	n Cruer Description		REC	=	IC:	=	=	noc	113	100	
OR0000325	OFF001	Office Supplies Unlimit	PRJ408/1	3,450.00		23/09/2021	Julanda Kessler	1.00	15.00		Quote for Call out	A	
OR0000330	HOP001	Hope Works (Pty) Ltd	PRJ408/003	1,886.00	ZAR	01/10/2021	Julanda Kessler	1.00	15.00			A	
OR0000331	BEA001	Bearing and Shoe	PRJ408/BS001	908.50	ZAR	01/10/2021	Julanda Kessler	1.00	15.00			A	

4. The *Select the option as desired* message will display with the fol-

lowing options;

• Fint Order will open the Sales Order in the Preview

screen to view, print, export or email.

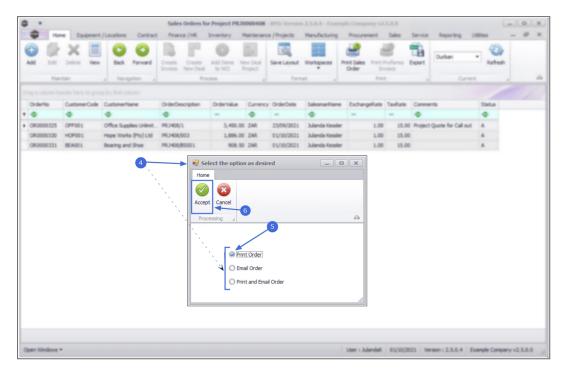
- Email Order will allow you to add recipients and the system will create a .pdf of the Sales Order as an Attachment to the email.
- Print and Email Order will display both the Report Preview and Email screens.



5. Click on the *radio button* to select the option you require.

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

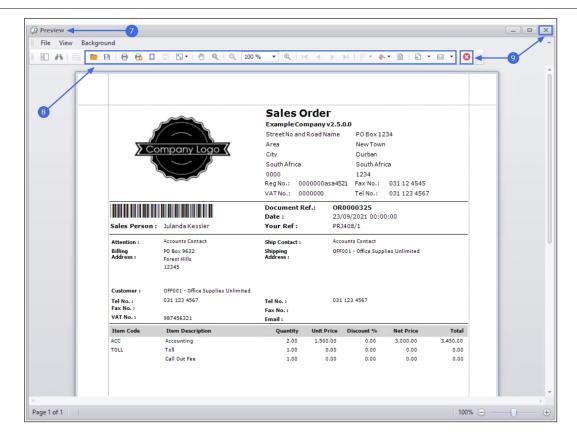
- The example has *Print Order* selected.
- 6. Click on *Accept*.



- 7. The Sales Order or the Proforma Invoice, this will depend on the print option you made earlier, will display in the *Preview* screen.
- From this screen 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.
- 9. 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





MNU.058.012

Help v2.5.0.14 - Pg 23 - Printed: 25/06/2024