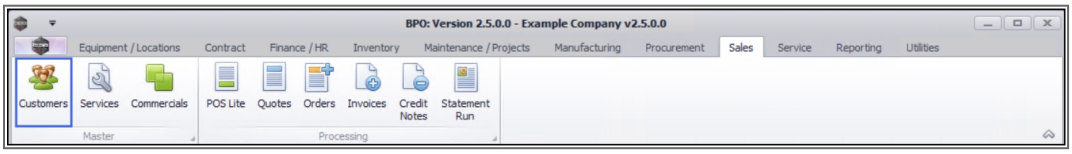
SALES

CUSTOMERS - ORDERS

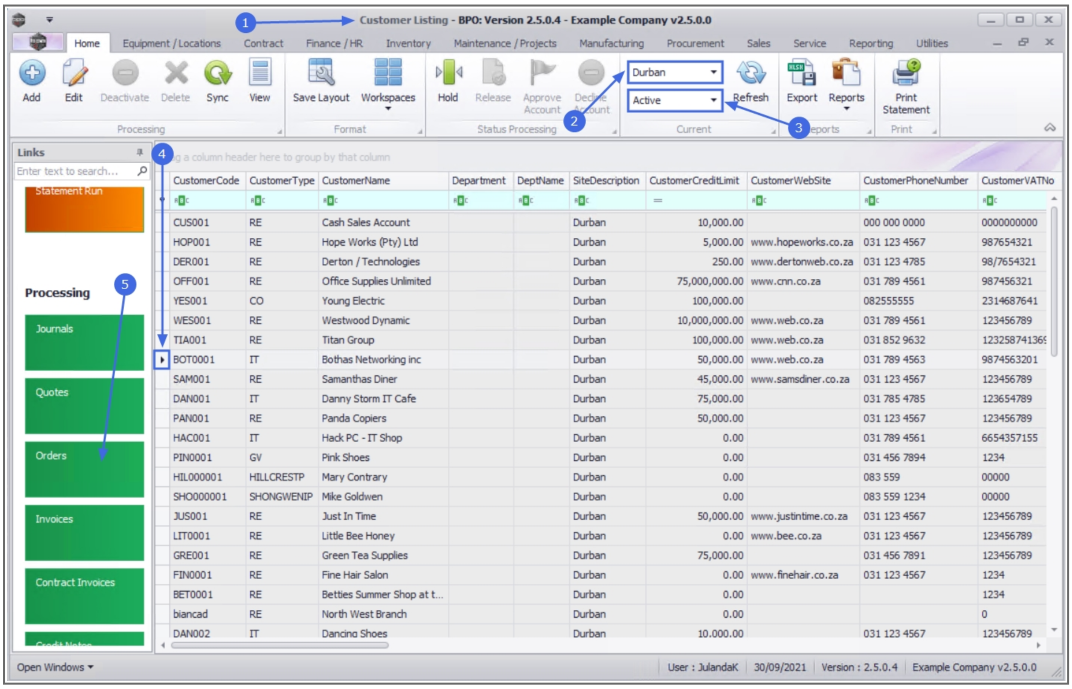
The **Orders** tile direct you to a list of Sales Orders for a selected Customer.

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.

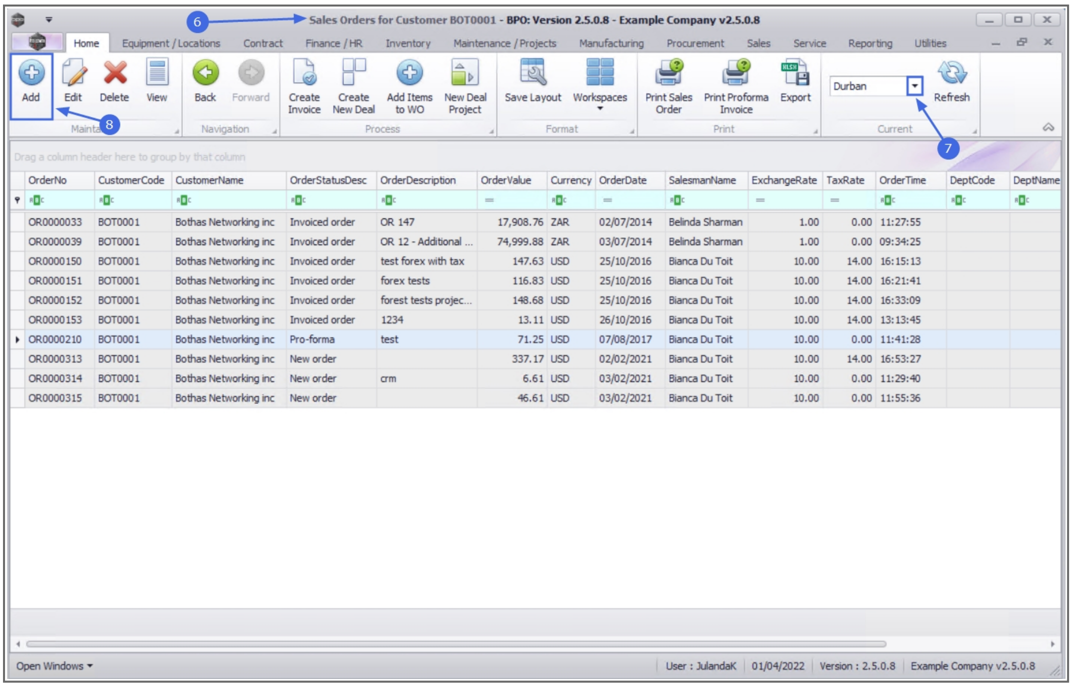
> The ***Site*** from the Customer Listing screen will not automatically pull through to the ***Sales Orders for Customer*** screen.

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.

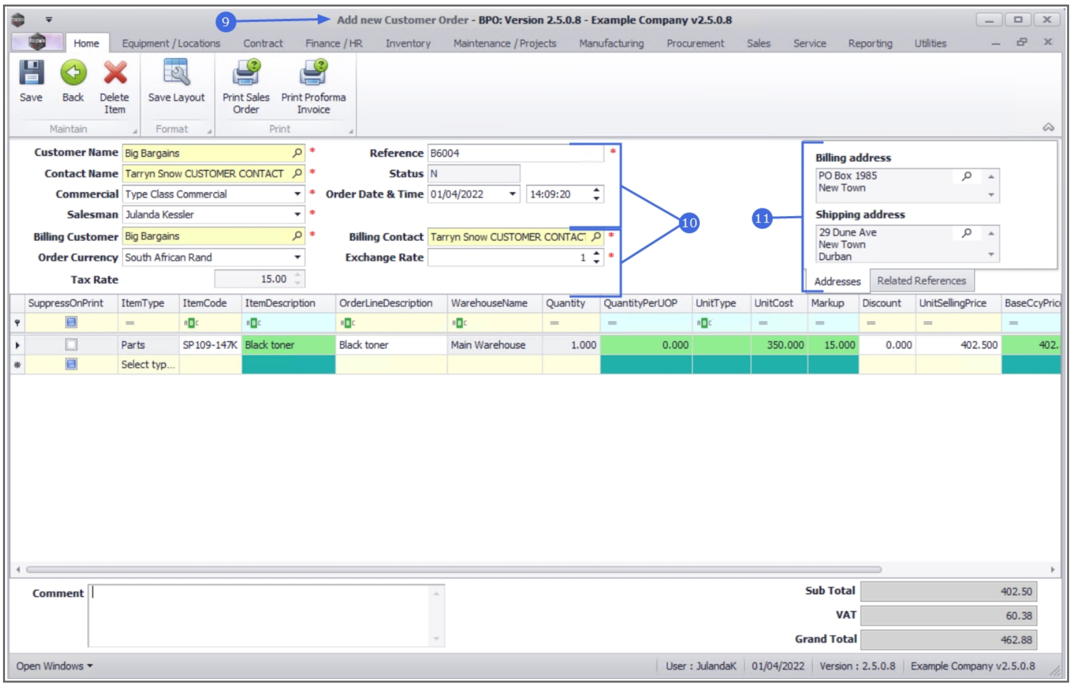
ADD SALES ORDER

8. Click on ***Add***.

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



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.



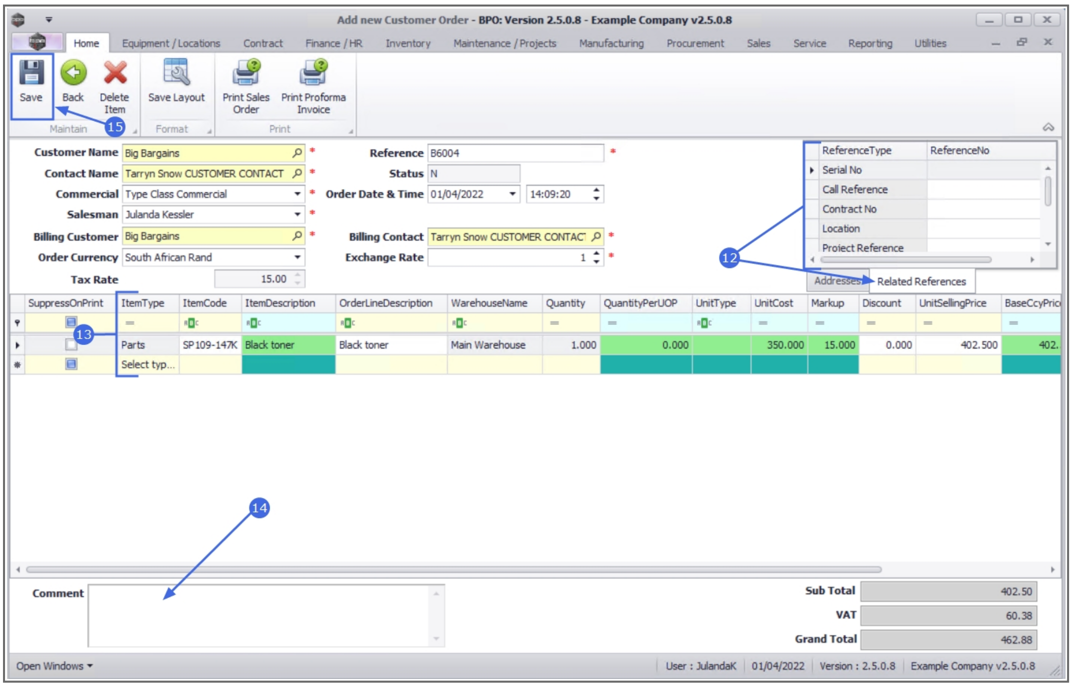
RELATED REFERENCES

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

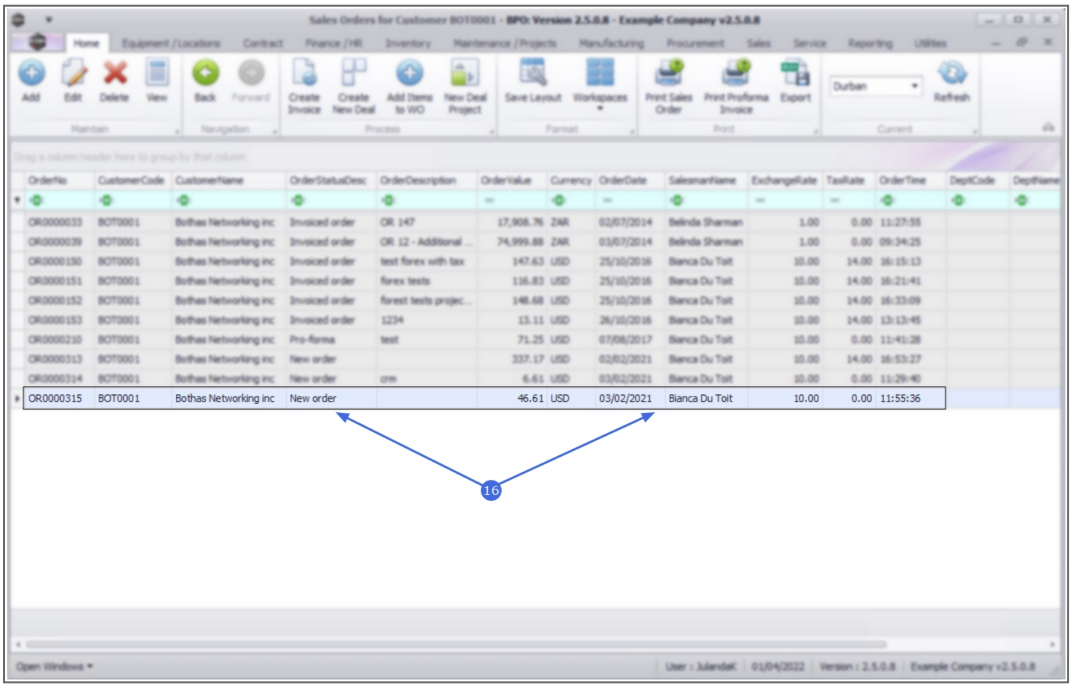
LINE ITEMS AND COMMENTS

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.

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



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

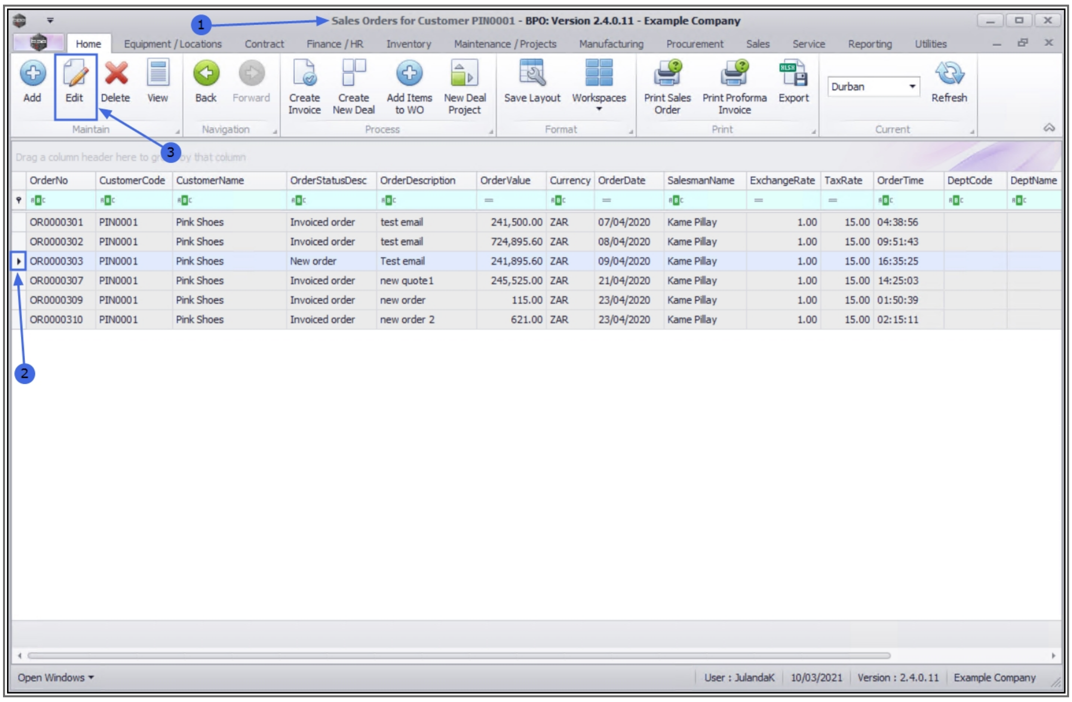


EDIT SALES ORDER

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 that you wish to edit.
3. Click on ***Edit***.

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

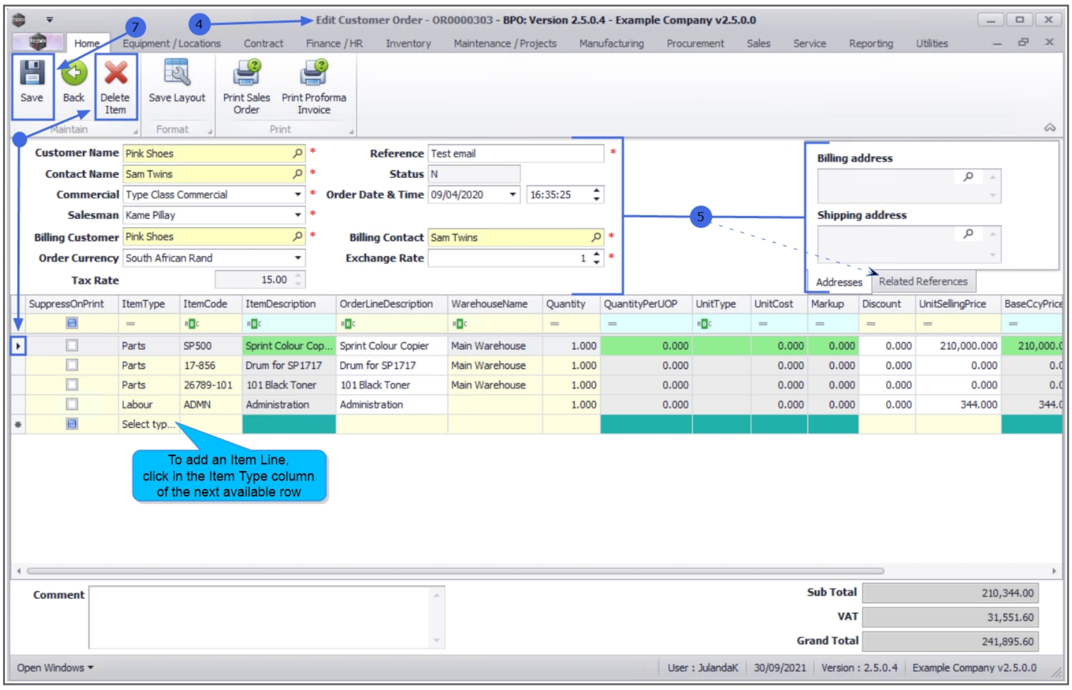


4. The ***Edit Customer Order - OR[****Order Number****]*** listing screen will display.
5. Make the required changes to the ***Heading Information***, ***Addresses*** or ***Related References tabs***.
6. Make the necessary changes to the Order Item frame:
   - To " Add Sales Order Items" on page 11,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

7. 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



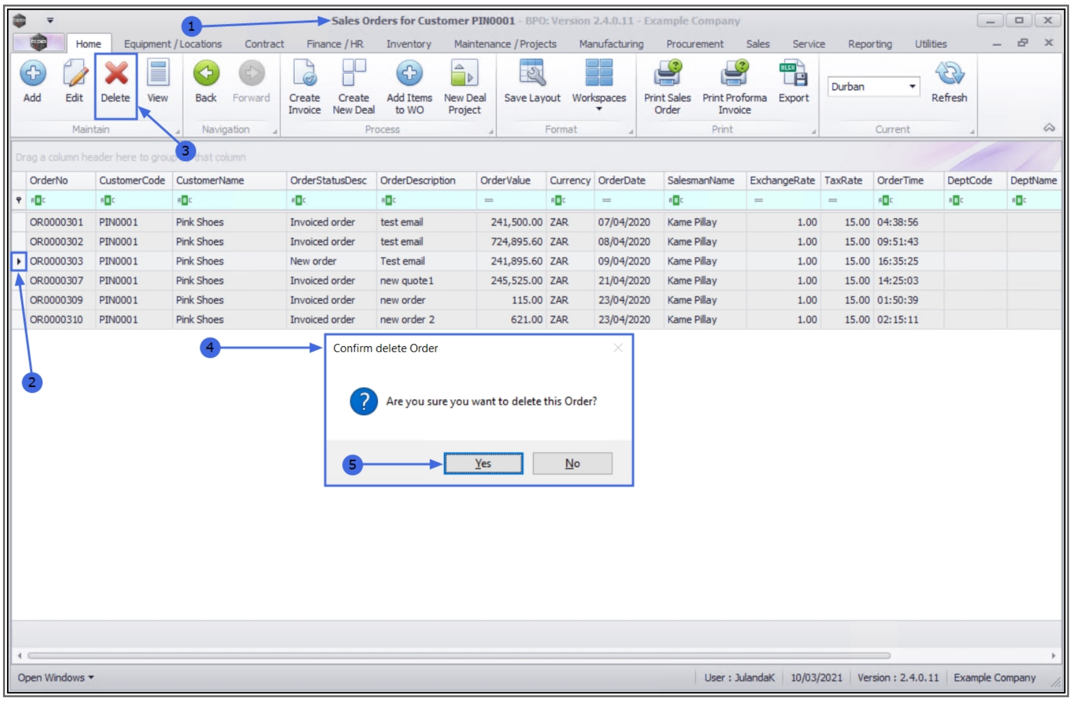
DELETE SALES ORDER

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

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



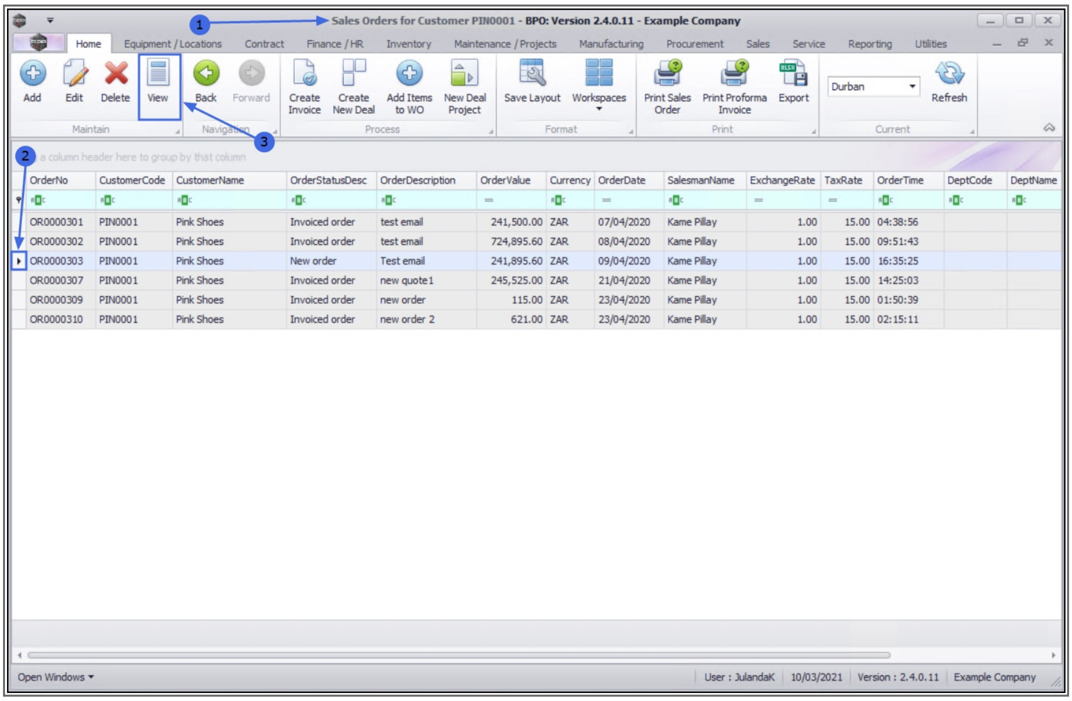
The Sales Order will be ***removed*** from the ***Sales Orders for Customer*** listing screen.

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

VIEW CUSTOMER ORDER

An Order can be *viewed* in any status.

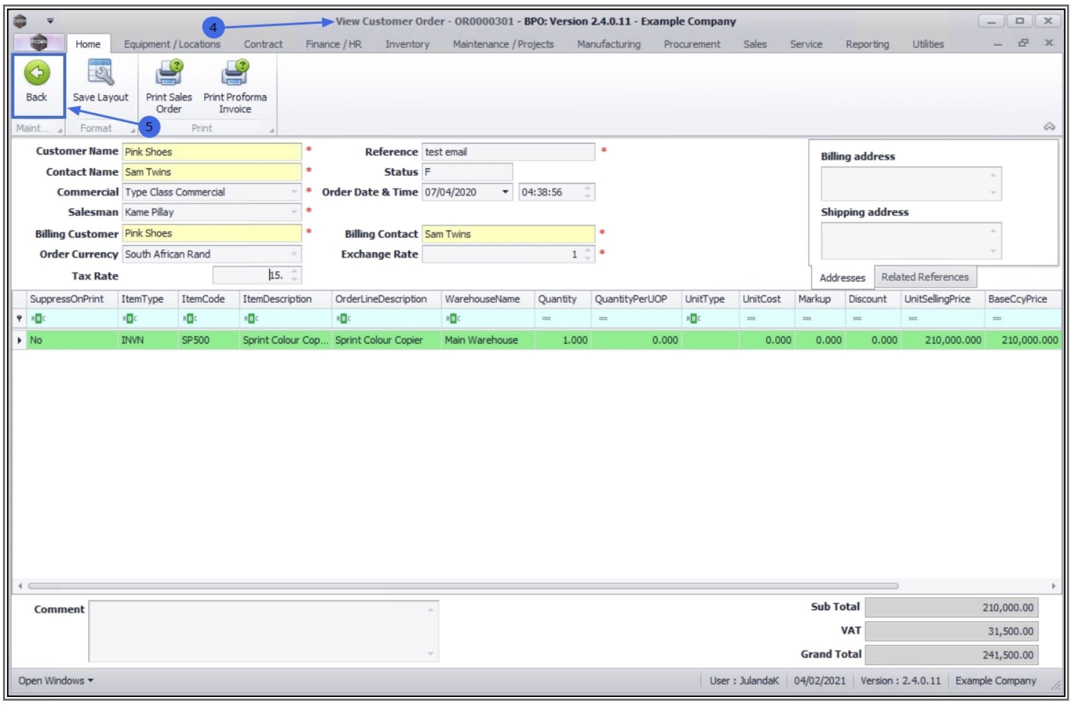
1. From the ***Sales Orders for Customer: [****Customer Code****]*** listing screen
2. Click on the ***row*** of the Sales Order that you wish to ***view***.
3. Click on ***View***.



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

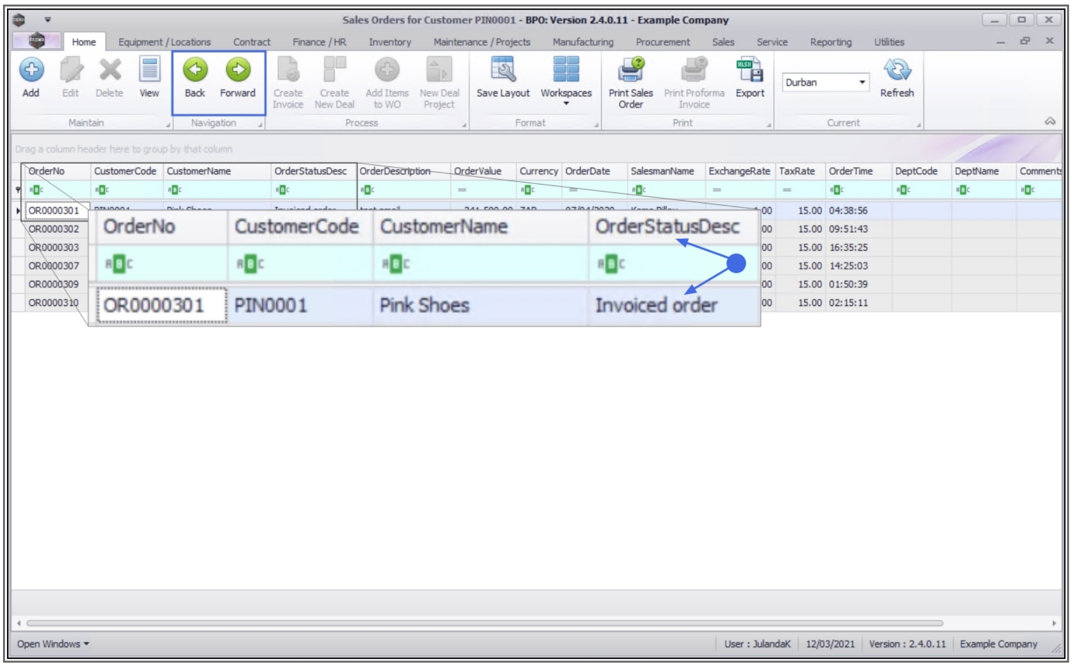
> No changes can be made to the information on the Order as this is a view only screen.

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



ORDER NAVIGATION BUTTONS

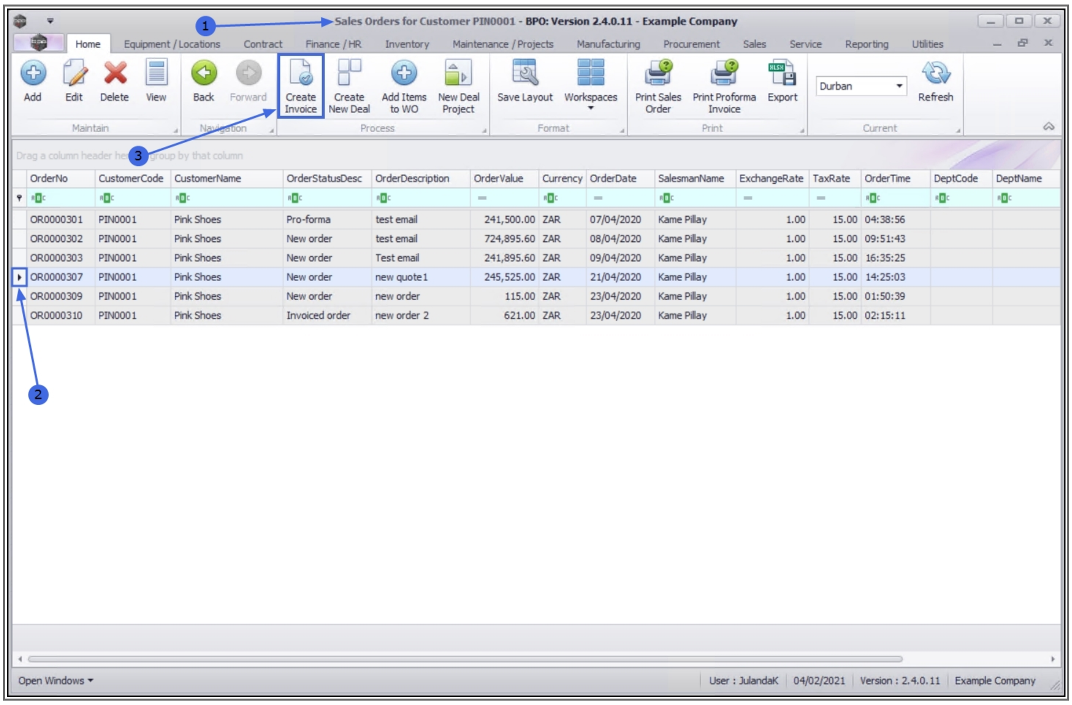
- The ***Forward*** navigation button, is only available in the '**[I] - Invoiced**' Order Status. This allows for quick navigation to the related documentation by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The ***Back*** navigation button will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

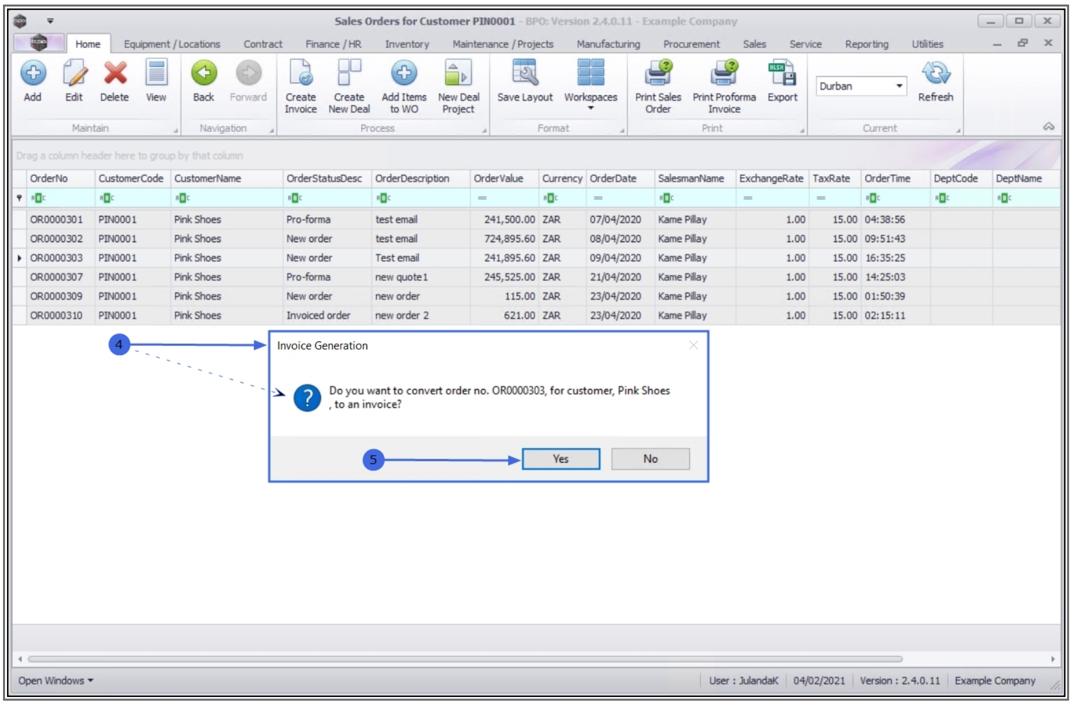
> **Short cut key:** ***Right click*** to display the ***All groups*** menu list. Click on ***Invoice***.



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

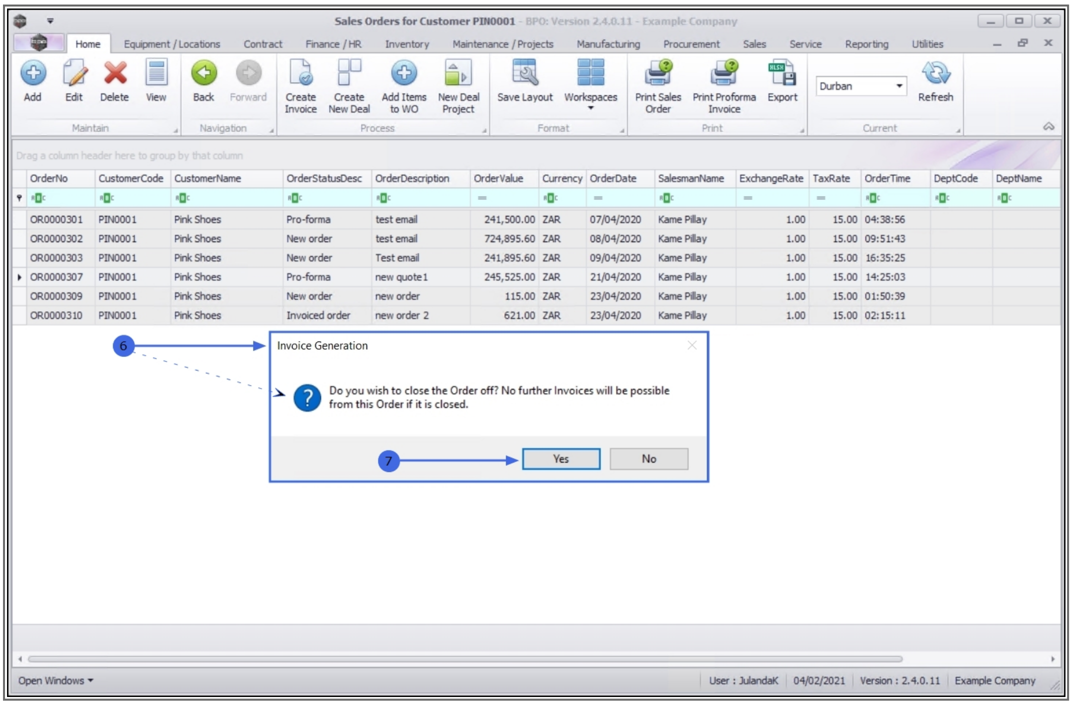
FIRST INVOICE GENERATION MESSAGE

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.*



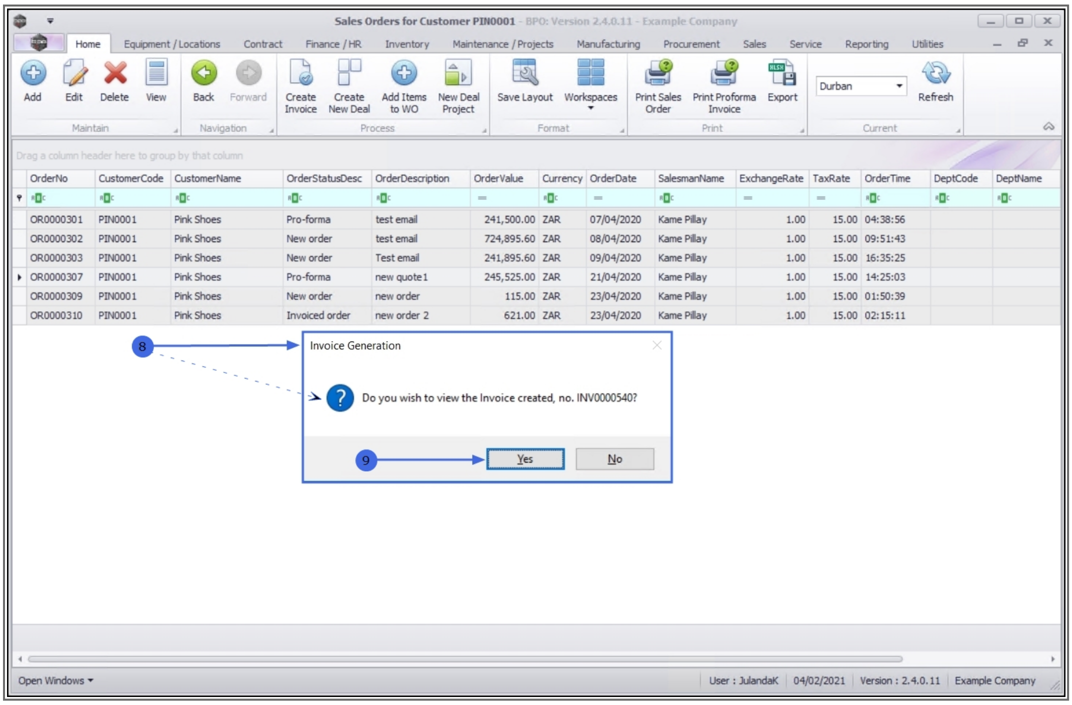
SECOND INVOICE GENERATION MESSAGE

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.*



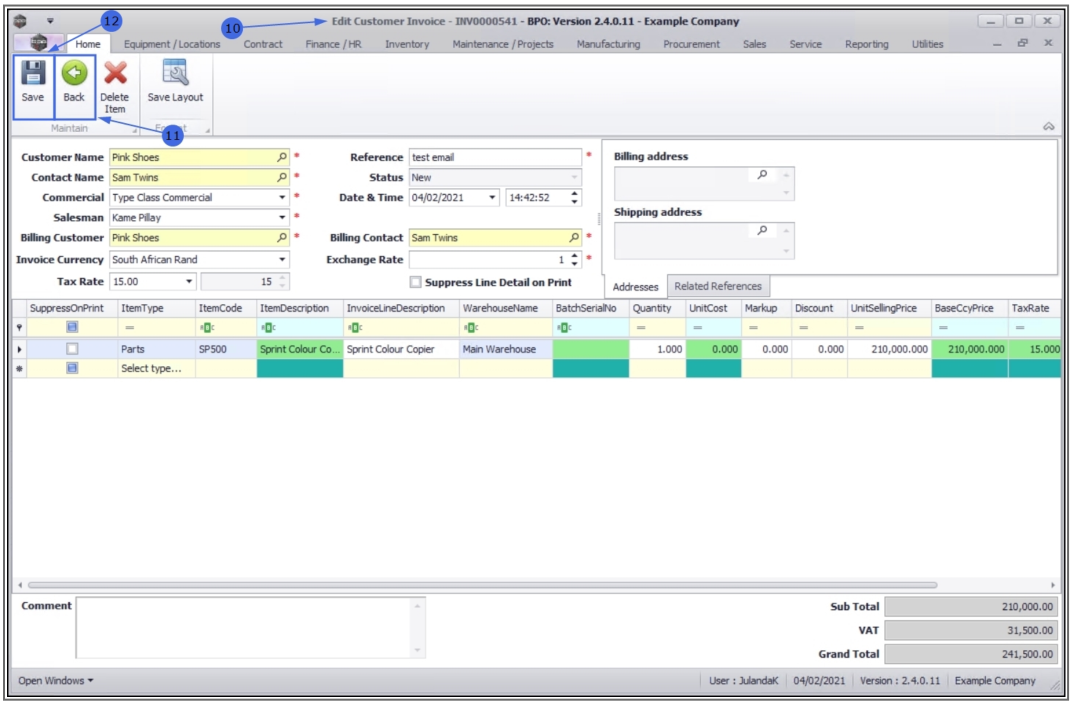
THIRD INVOICE GENERATION MESSAGE

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.

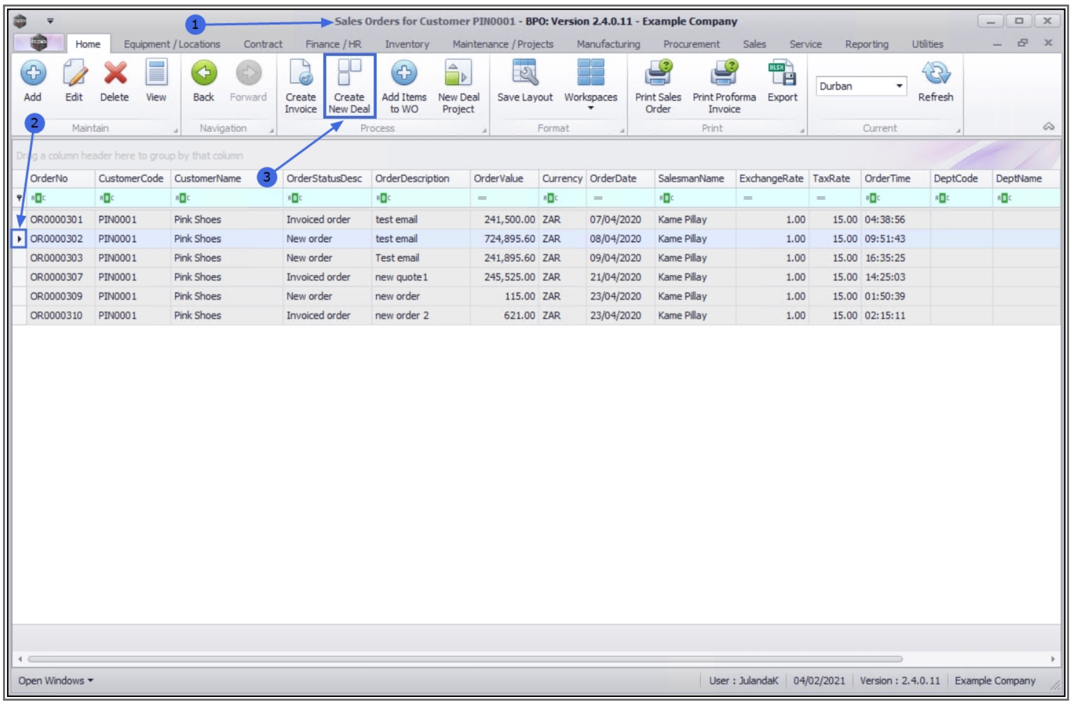
For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



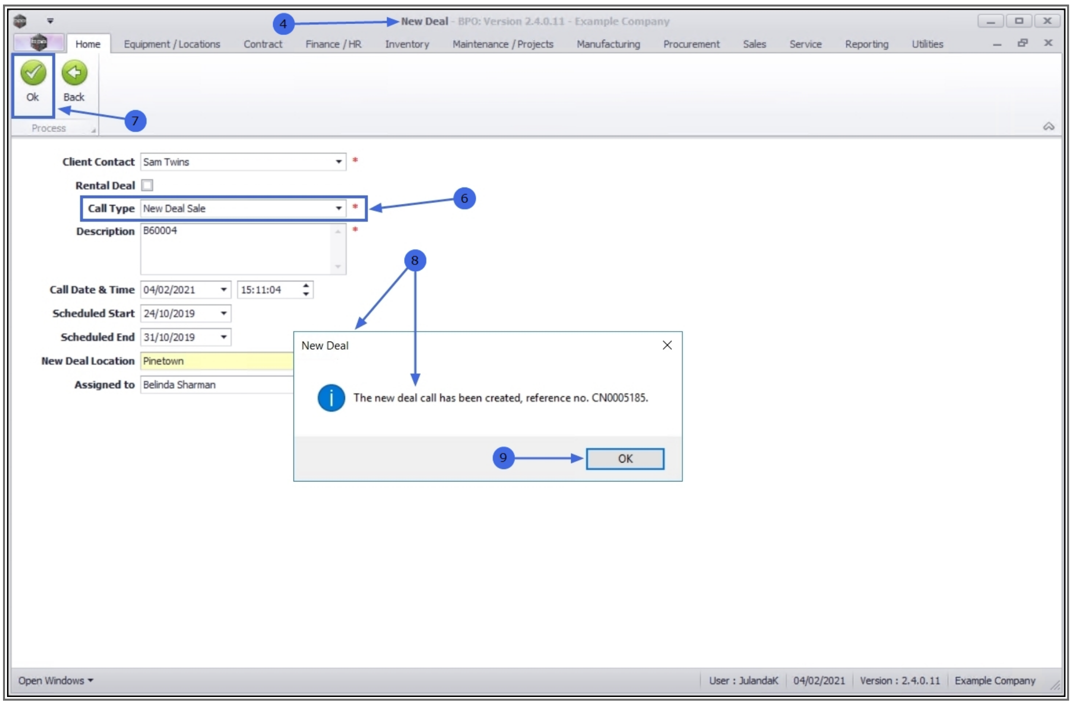
CREATE NEW DEAL

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.

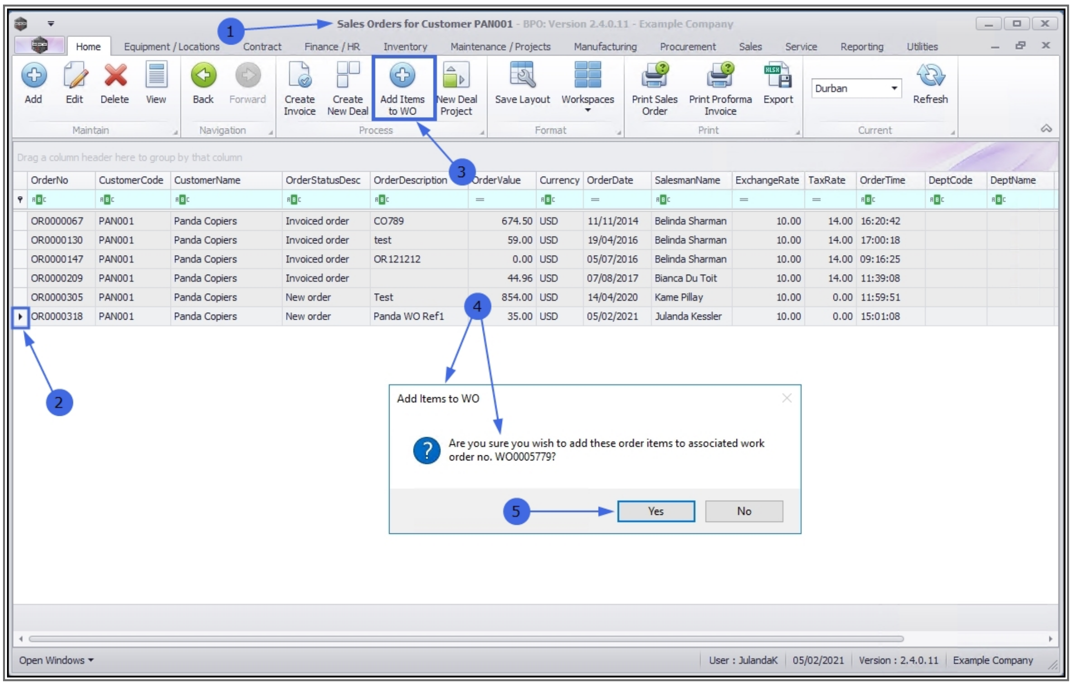
1. From the ***Sales Orders for Customer [****Customer Code****]*** screen,
2. Select the ***row*** of the Sales Order you wish to add items to.
3. Click on ***Add Items to WO***.

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;

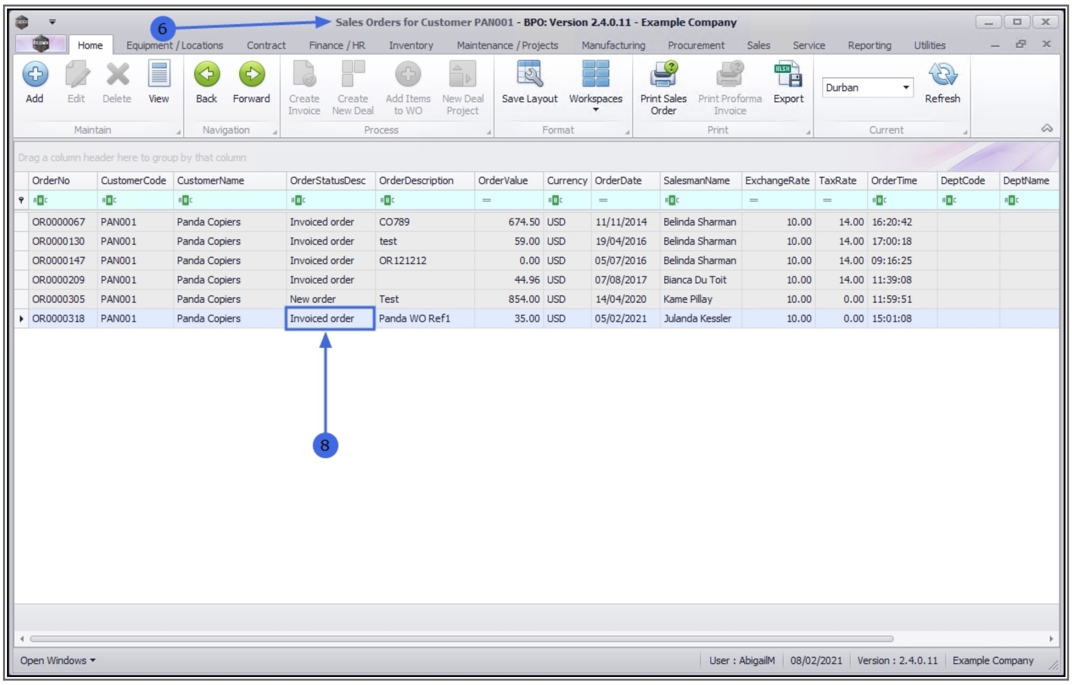
- ***Are you sure you wish to add these order items to associated work order no [ ]?***

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



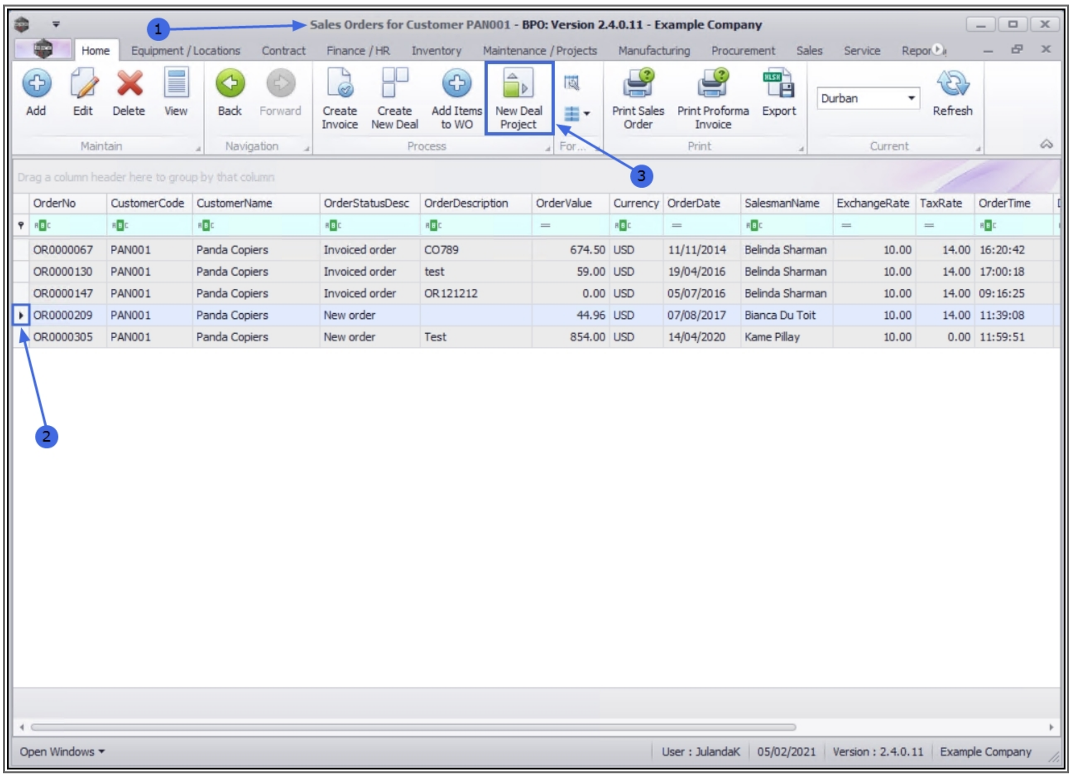
NEW DEAL PROJECT

- 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.

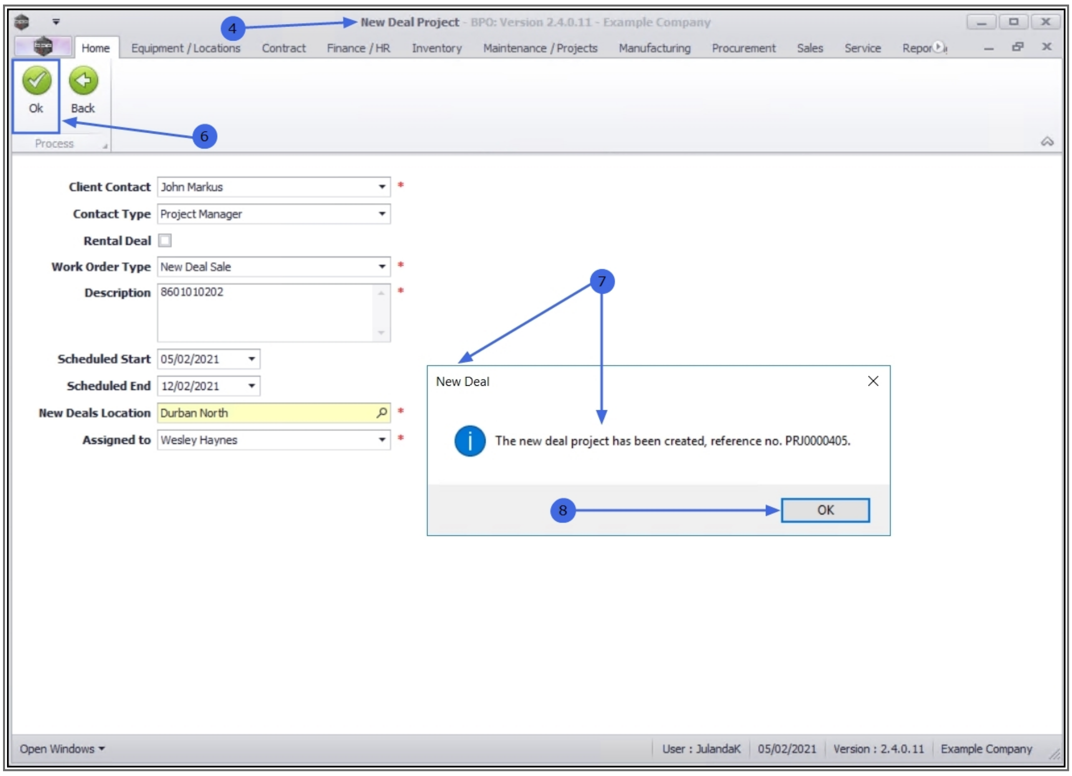
1. From the ***Sales Orders for Customer [****Customer Code****]*** screen,
2. Click on the ***row*** of the ***Sales Order*** you wish to convert to a New Deal Project.

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

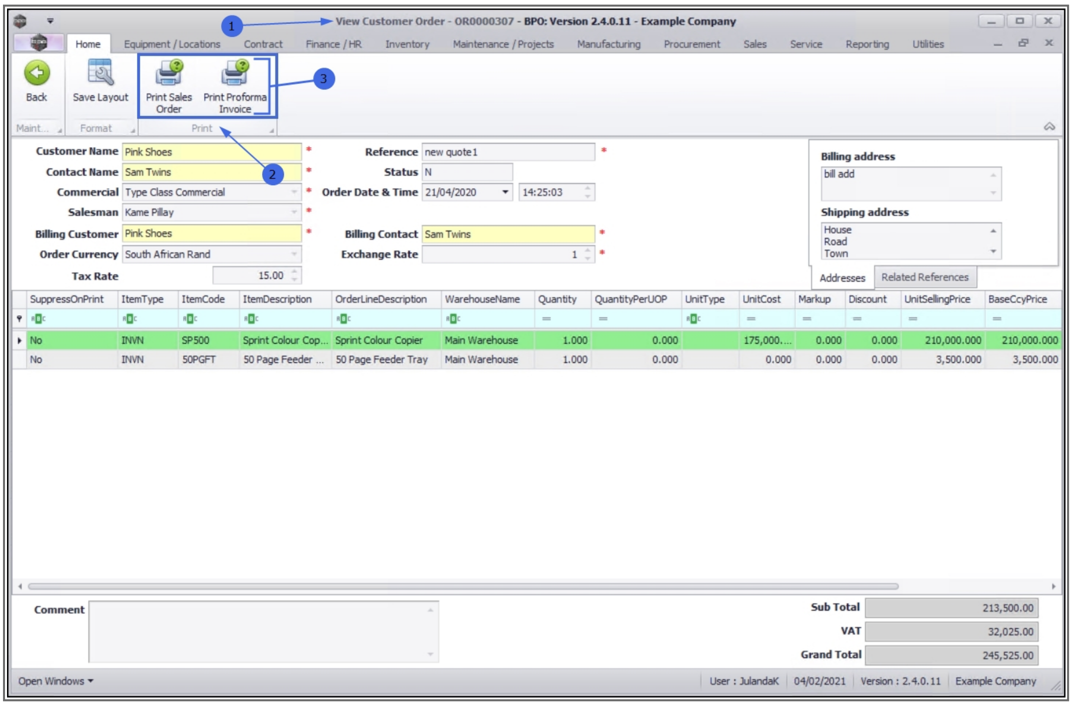
PRINT SALES ORDER / PRINT PROFORMA INVOICE

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.

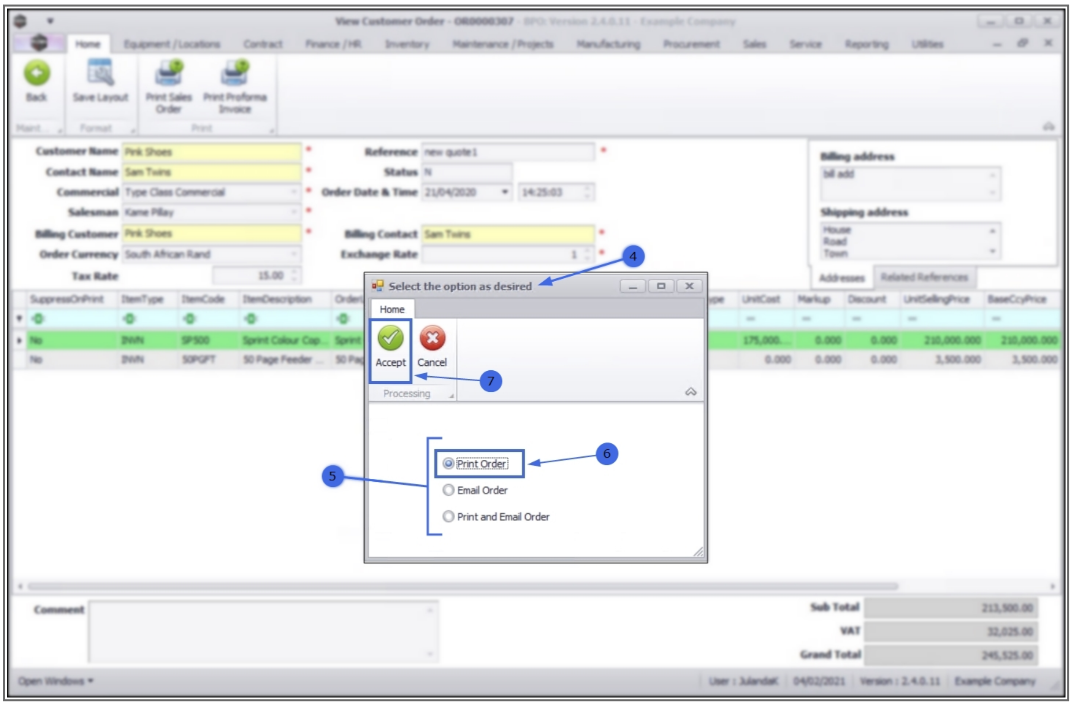
1. From the ***View Customer Order - OR[****Order Number****]*** screen,
2. Click the print option that you require.
    - Print Sales Order
    - Print Proforma Invoice
3. The example has ***Print Proforma Invoice*** selected.



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***.

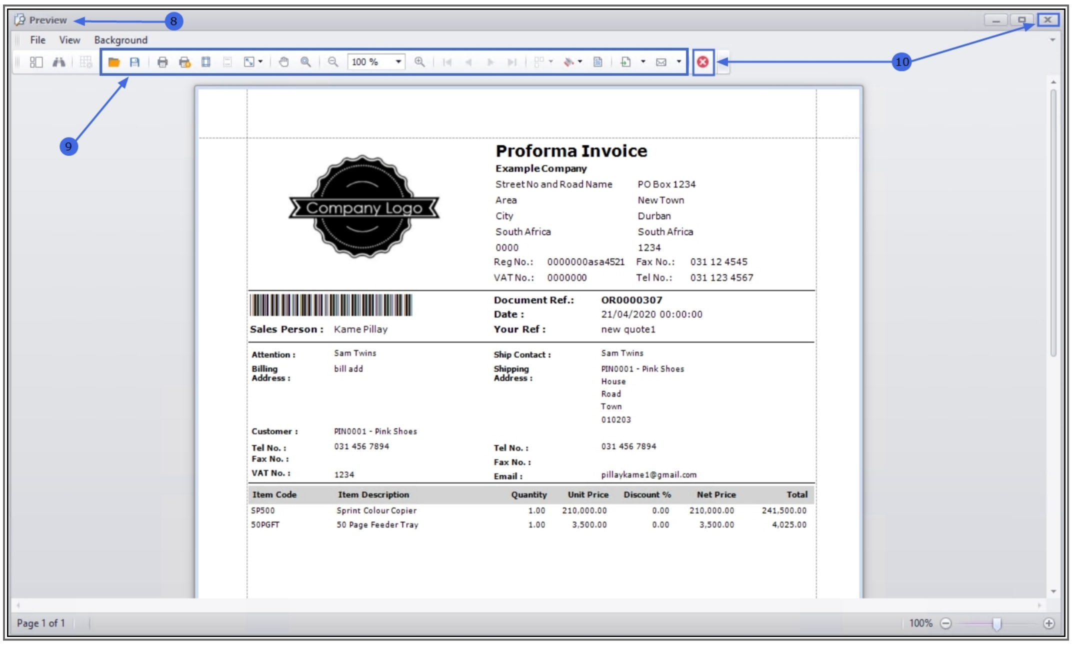
> When selecting to *Email the Quote*, the quote will be emailed via the *BPO Email Service* on the server and not from MS Outlook.

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


Preview
File View Background
100 %
8
9
10
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.: 0000000asa4521 Fax No.: 031 12 4545
VAT No.: 0000000 Tel No.: 031 123 4567
Document Ref.: OR0000307
Date : 21/04/2020 00:00:00
Sales Person : Kame Pillay
Your Ref : new quote1
Attention : Sam Twins
Billing Address : bill add
Ship Contact : Sam Twins
Shipping Address : PIN0001 - Pink Shoes House Road Town 010203
Customer : PIN0001 - Pink Shoes
Tel No. : 031 456 7894
Fax No. :
VAT No. : 1234
Tel No. : 031 456 7894
Fax No. :
Email : 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
50PGFT 50 Page Feeder Tray 1.00 3,500.00 0.00 3,500.00 4,025.00
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