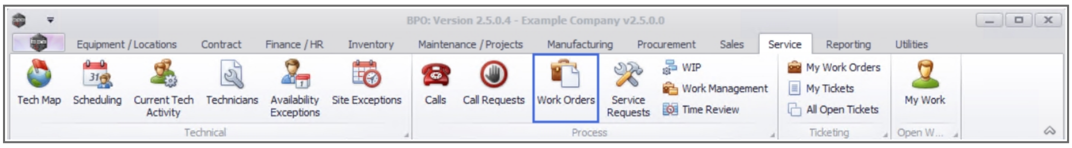
SERVICE

WORK ORDERS - SALES ORDERS

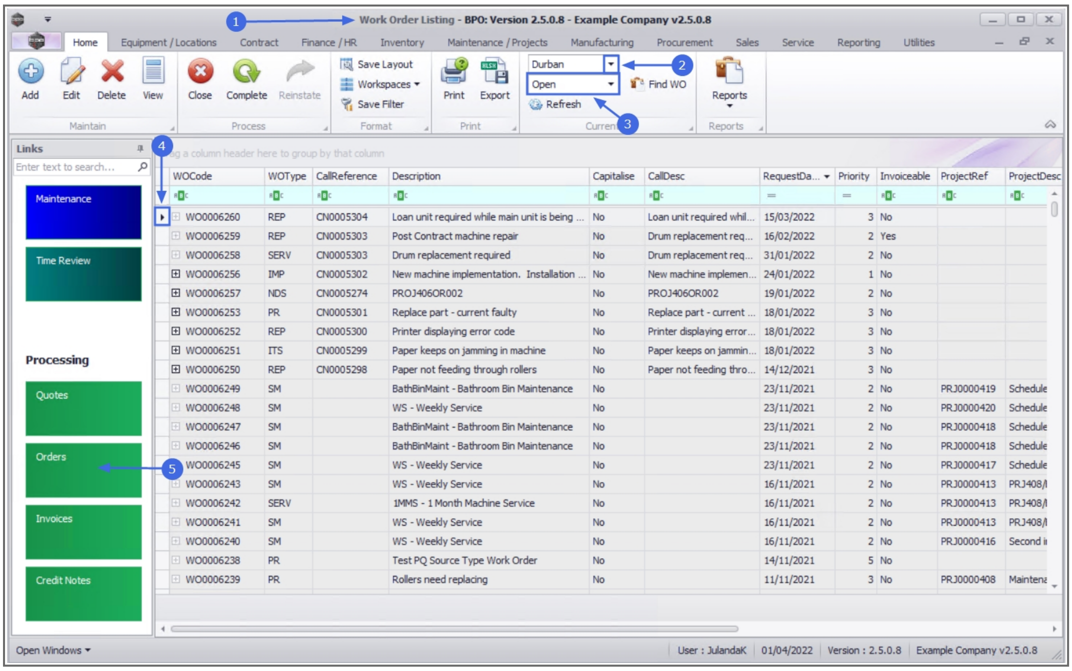
The **Orders** tile direct you to a list of Sales Orders for a selected Customer.

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: *Service > Work Orders*



1. The ***Work Orders Listing*** screen will be displayed.
2. Select the ***Site*** where the work order was issued.
    - The example has ***Durban*** selected.
3. Select the ***Status***.
    - The example has ***Open*** selected.
4. Select the ***row*** of the ***work order*** you wish to convert to a sales order.
5. Click on the ***Orders*** tile.



6. The ***Sales Orders for Work Order[****work order number****]*** screen will be displayed.

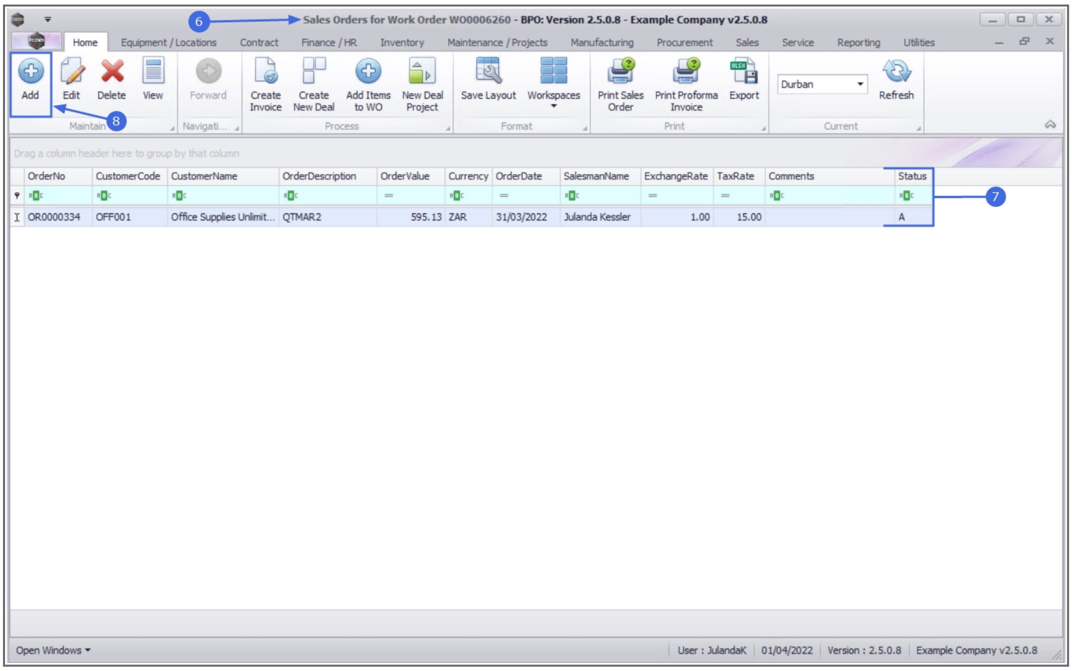
> The *Site* from the Customer Listing screen will not automatically pull through to the *Sales Orders for Work Order* screen.

7. Any Sales Orders that have already been added to the work order will display in the data grid.

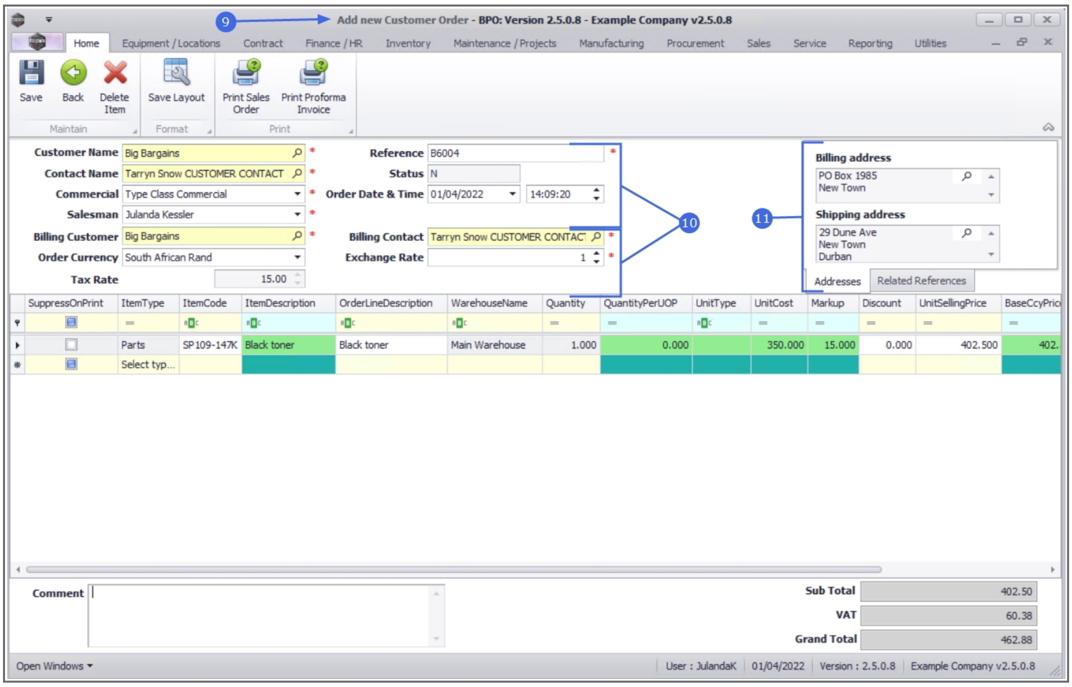
ADD SALES ORDER

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. " on page 2
10. Complete the ***Sales Order Header*** and the ***Financial Header*** Inform-ation.
11. Confirm the ***Billing and Shipping Addresses*** for the customer, if these fields were not auto populated when you entered the order header information.

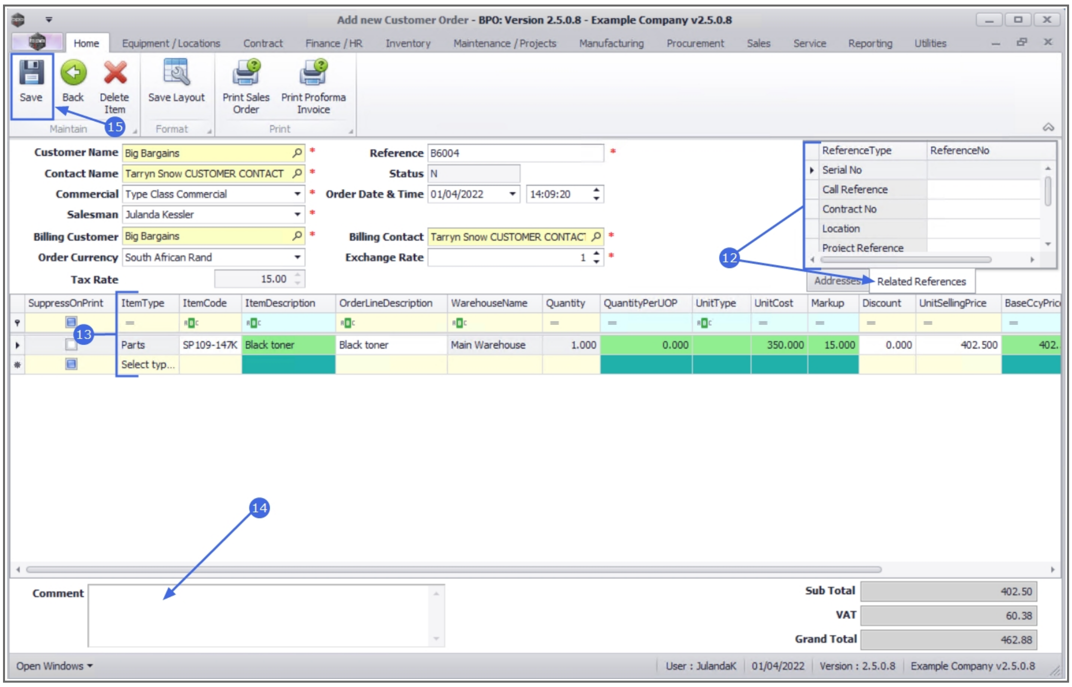


RELATED REFERENCES

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

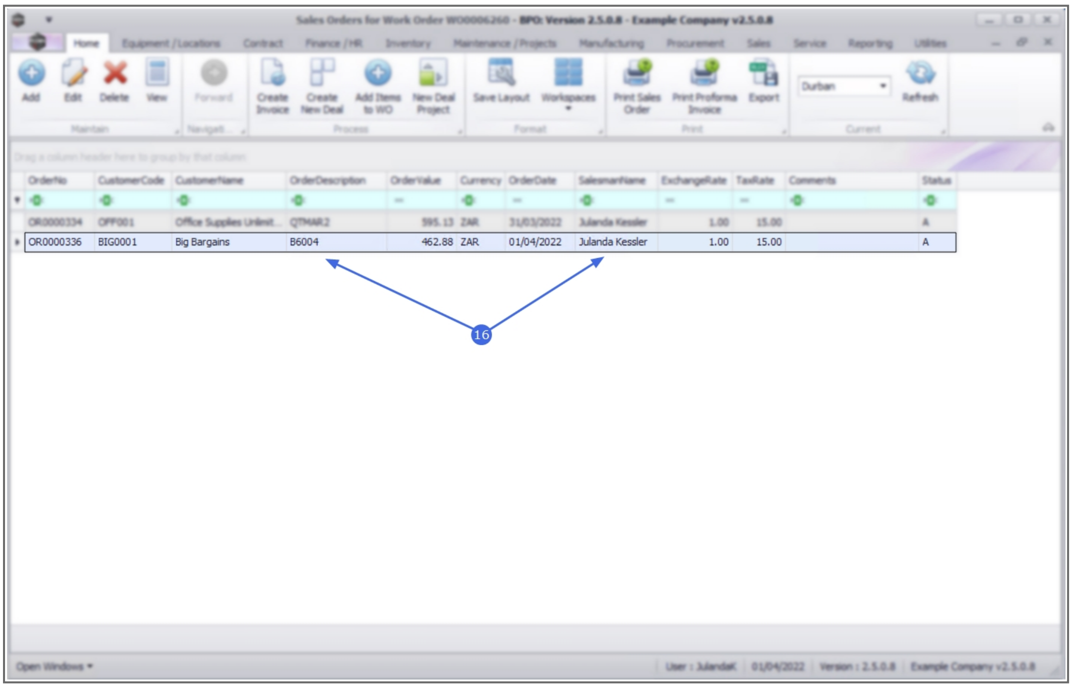
LINE ITEMS AND COMMENTS

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.



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

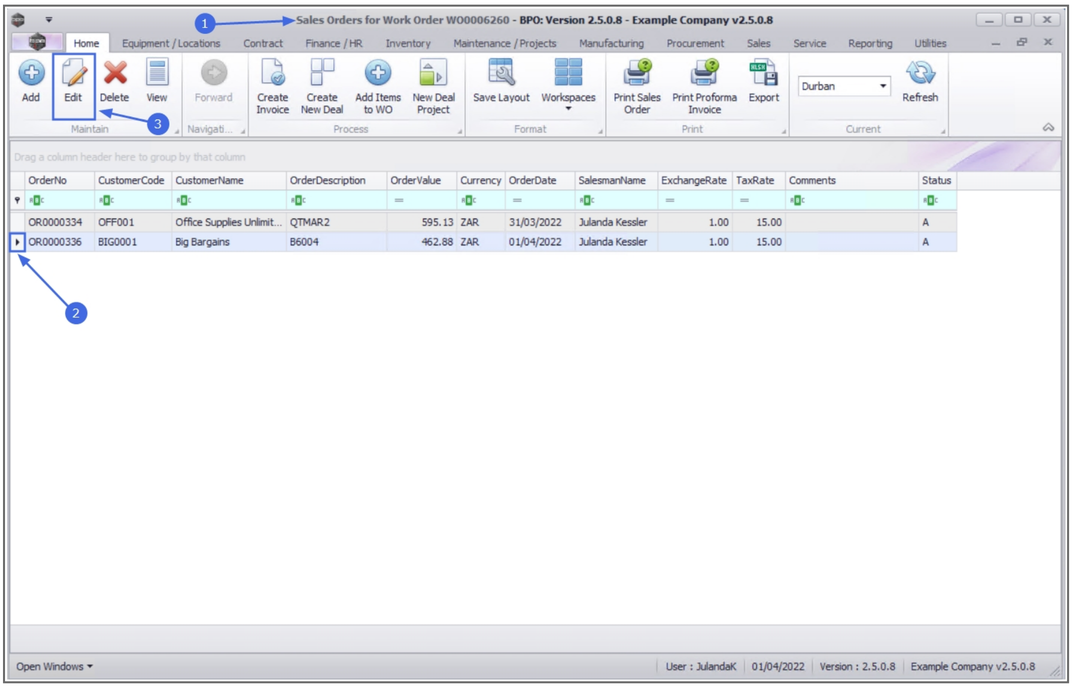


EDIT SALES ORDER

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

1. From the ***Sales Orders for Customer** [Customer Code]* 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***.

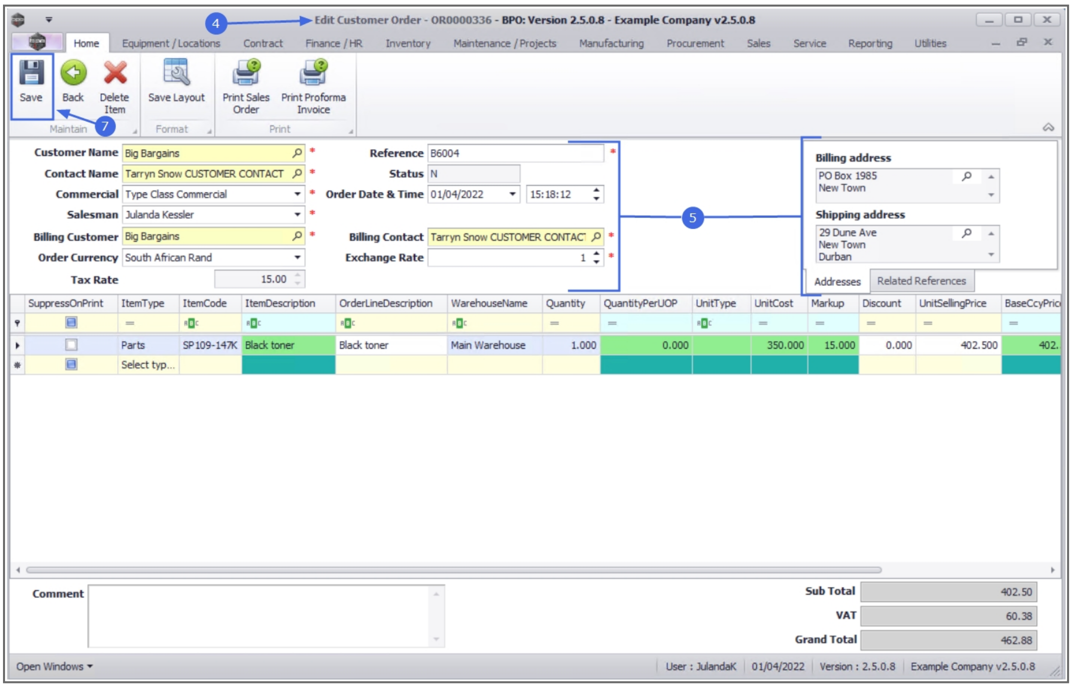


4. The ***Edit Customer Order - **[Order Number]* listing screen will display.
5. Make the required changes to the ***Heading Information***, ***Addresses*** or ***Related References tabs***.
6. Make the necessary changes to the Order Item frame:
   - To " Add Sales Order Items" on page 11, click in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



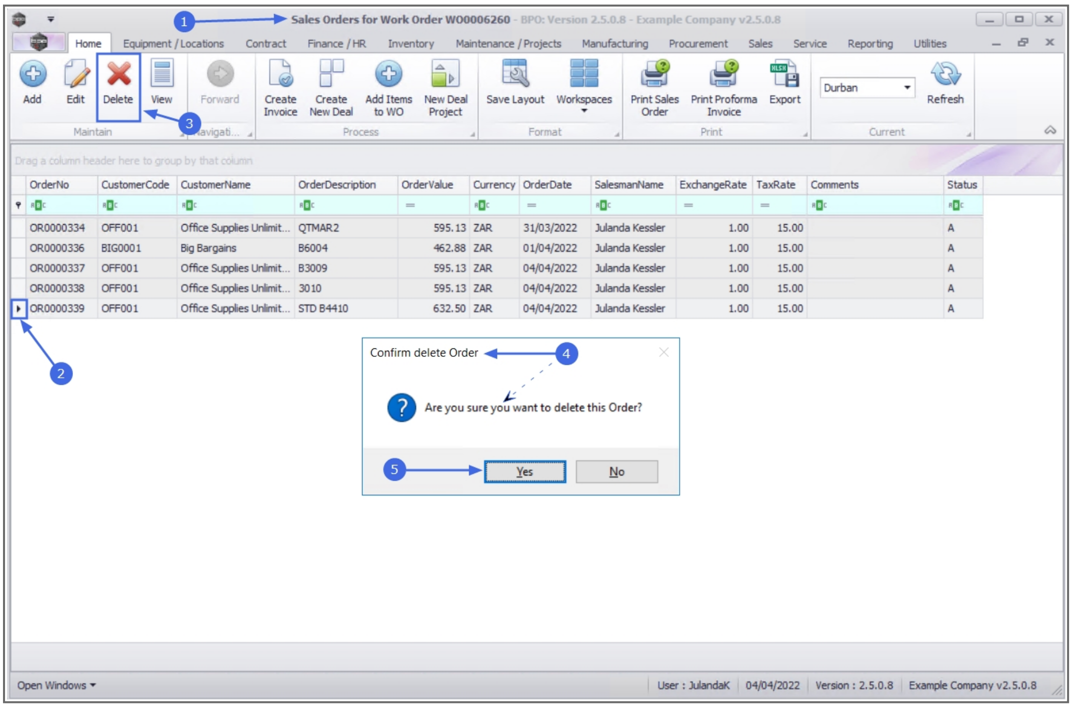
DELETE SALES ORDER

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

1. From the ***Sales Orders for Work Order*** *[work order number]* screen,
2. Click on to the ***row*** of the Sales Order 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 will display;
    - ***Are you sure you want to delete this Order?***
5. Click on ***Yes***.



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

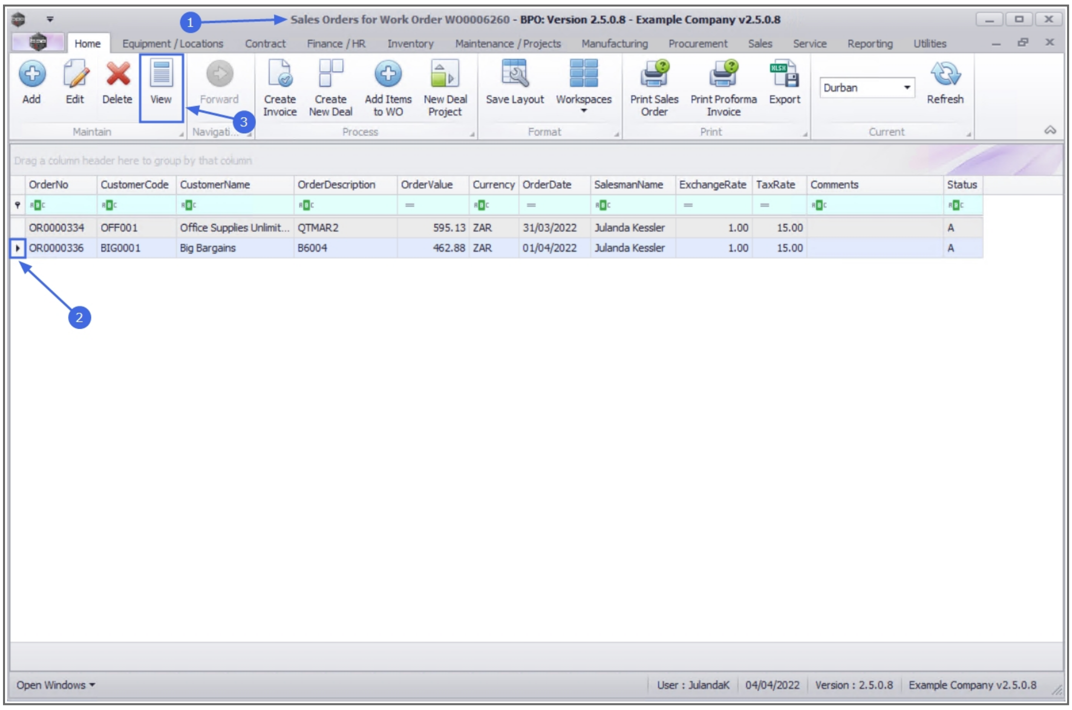
For a detailed handling of this topic refer to Orders - Delete Sales Order

VIEW SALES ORDER

An Order can be *viewed* in any status.

1. From the ***Sales Orders for Work Order [****work order number****]*** screen,
2. Click on the ***row*** of the Sales Order that you wish to ***view***.
3. Click on ***View***.

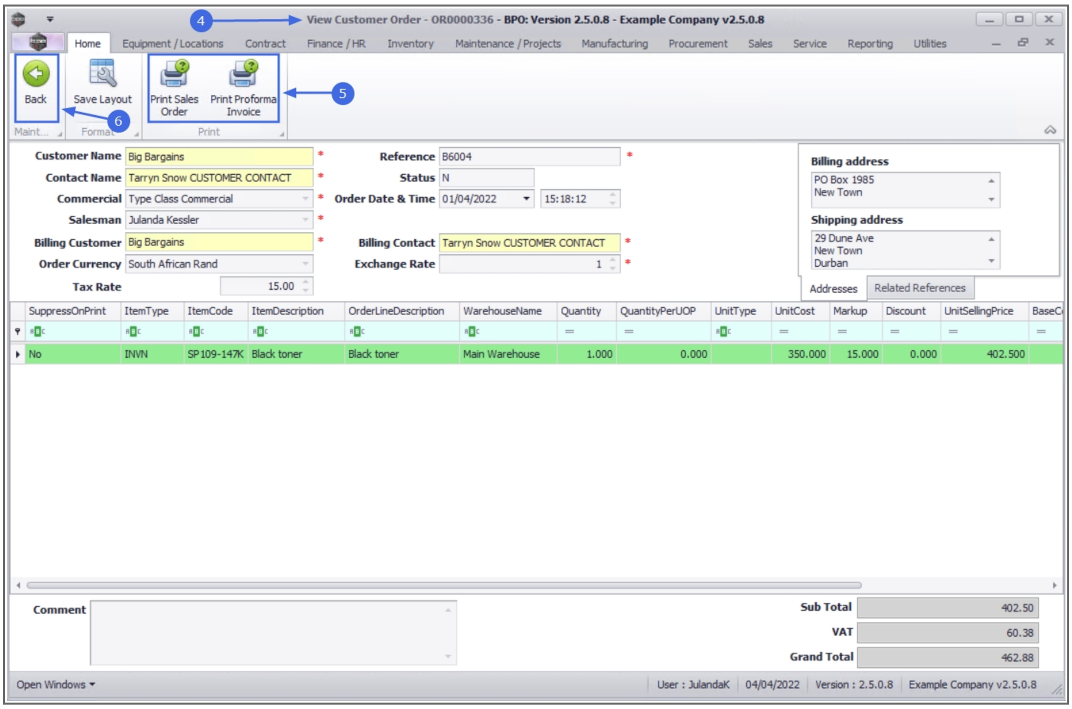
Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***View***.



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

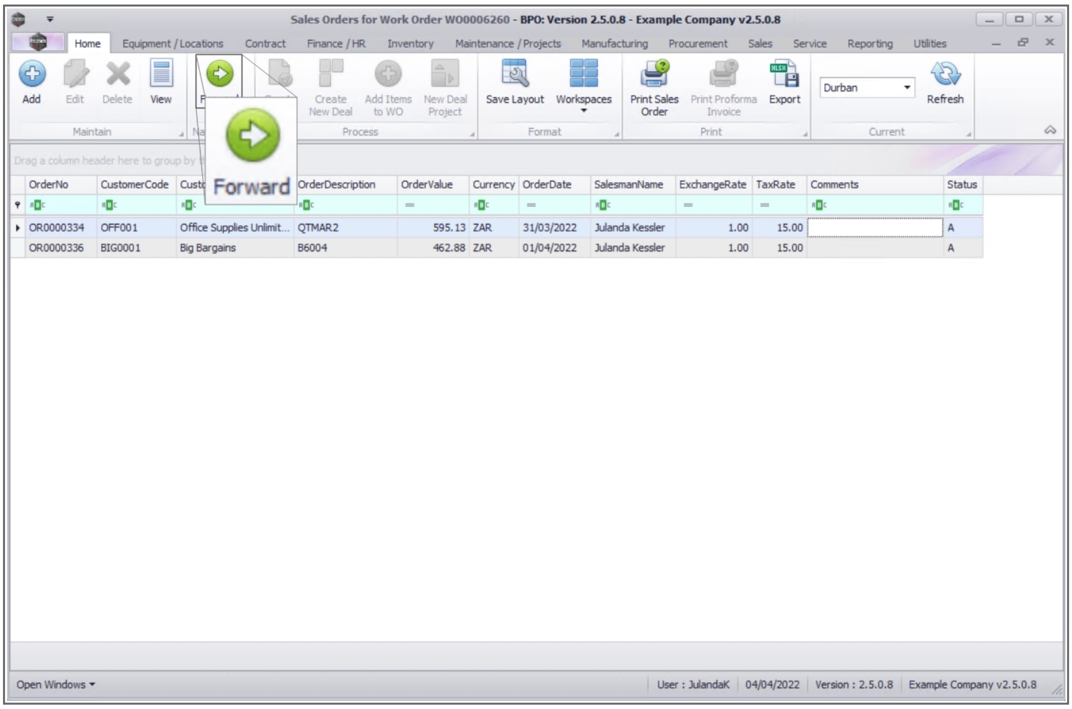
No changes can be made to the information on the Order as this is a view only screen.

5. You can "Print Sales Order / Print Proforma Invoice" on page 21 from this screen.
6. Click ***Back*** to return to the ***Sales Orders for Work Order*** screen.



NAVIGATION BUTTONS

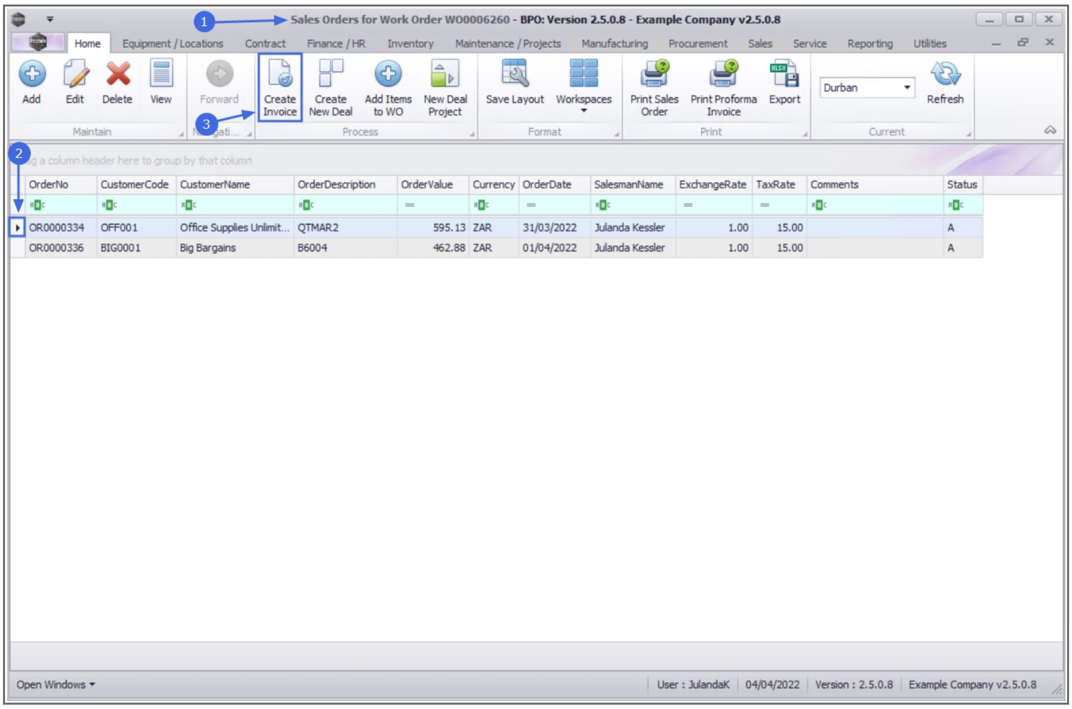
- The ***Forward*** navigation button allows for quick navigation to related documentation, by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The ***Back*** navigation button will transport you back to the ***Work Order Listing*** screen.



CREATE INVOICE

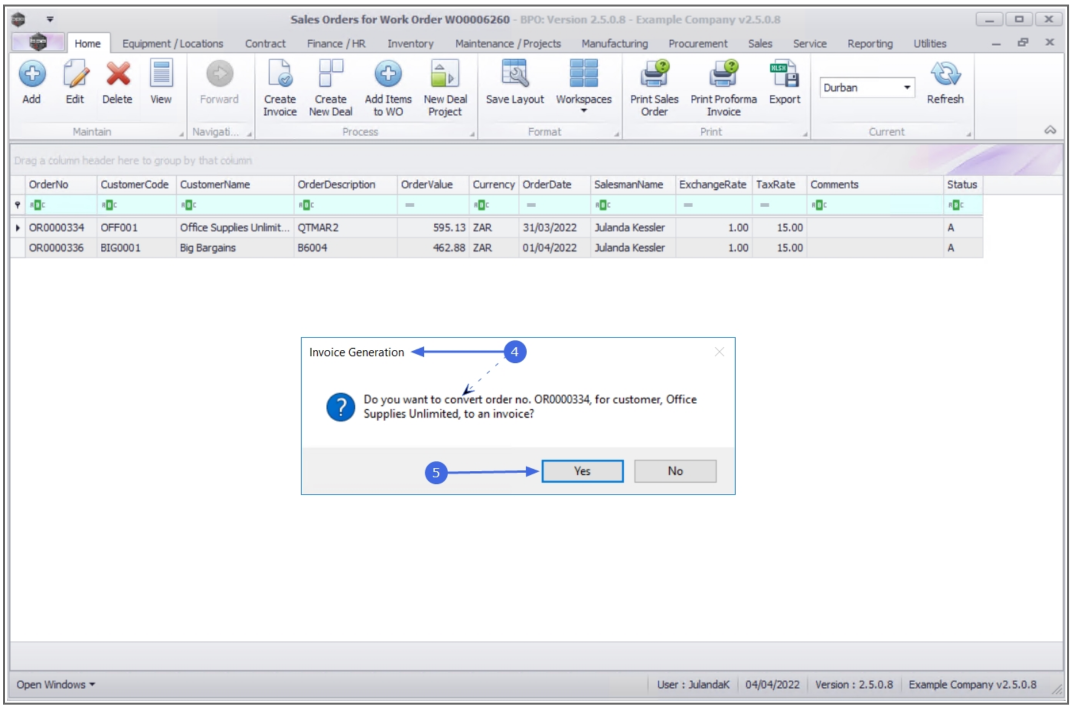
1. From the ***Sales Orders for Work Order** [work order number]* screen,
2. Select the ***row*** of the Sales Order you wish to ***create an invoice*** for.
3. Click on ***Create Invoice***.

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

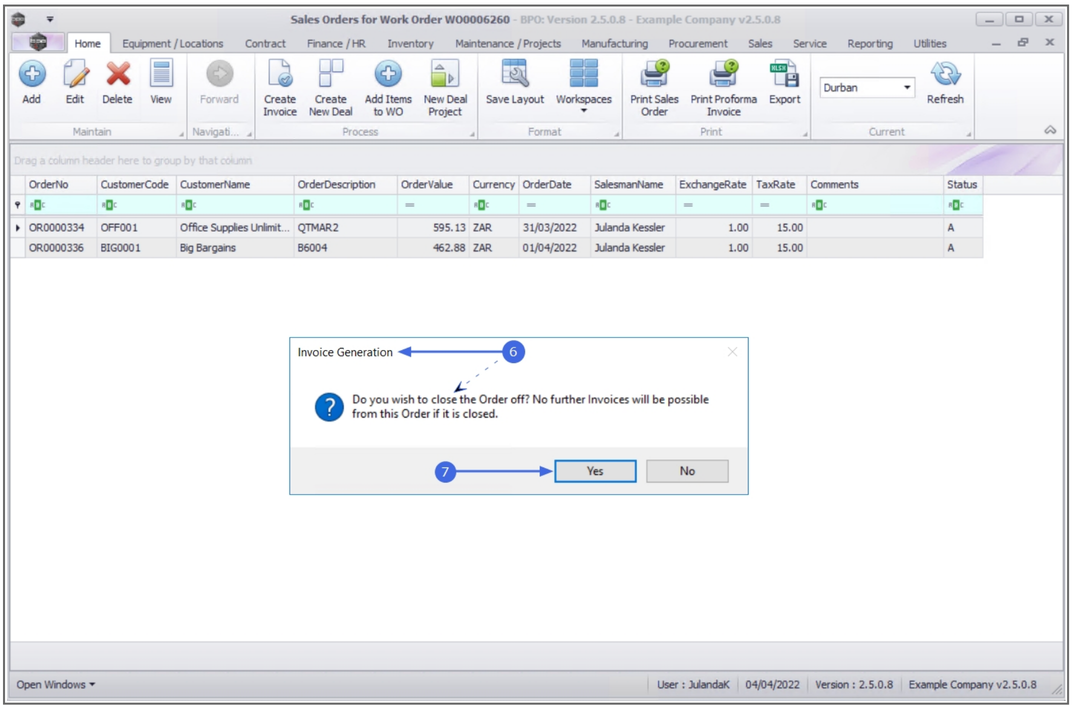


You will receive three (**3**) ***Invoice Generation*** messages:

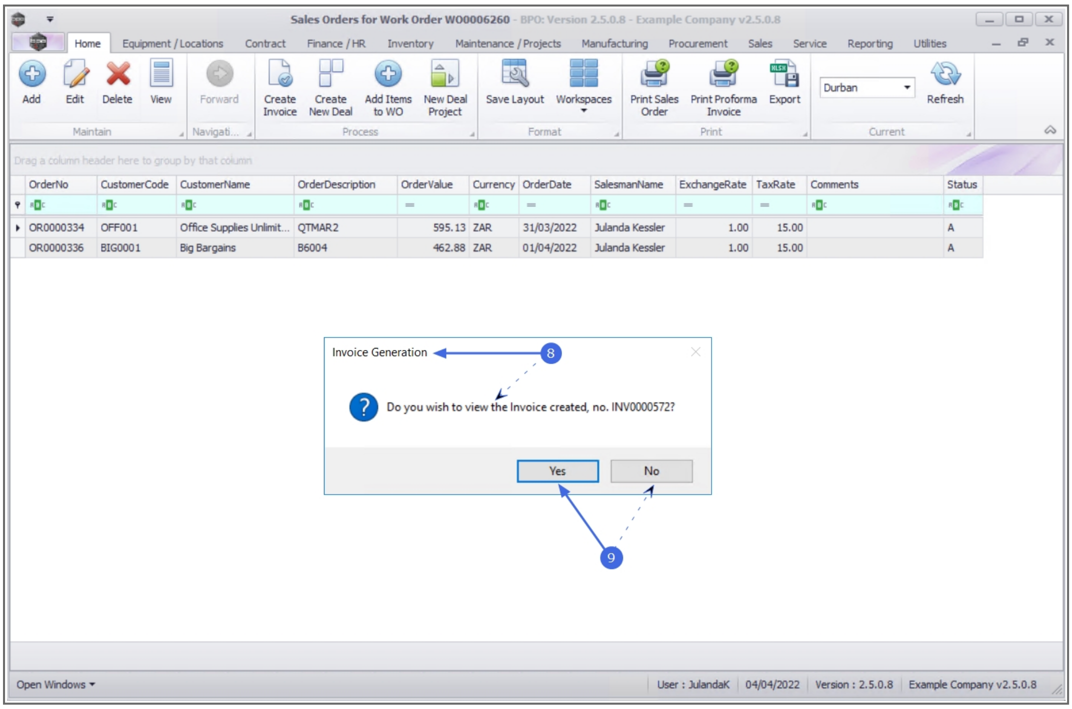
4. The first ***Invoice Generation*** message will confirm;
   - ***Do you want to convert order no. [****order number****], for customer, [****customer code****], to an invoice?***
5. Click on ***Yes***.



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***.

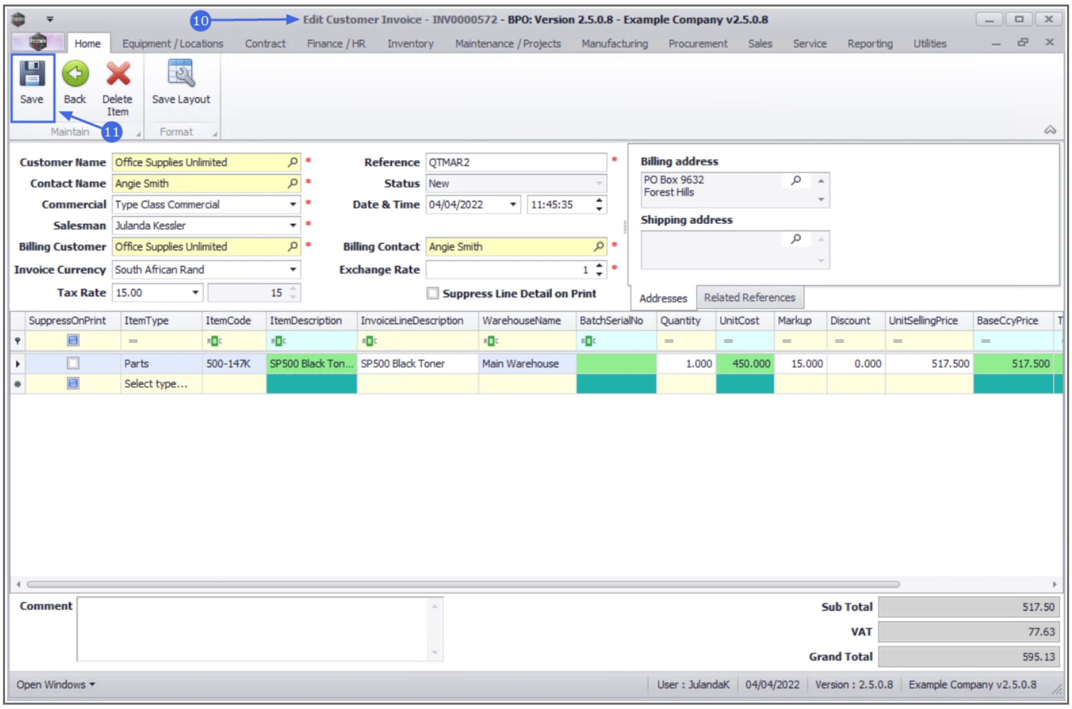


8. When you receive the third ***Invoice Generation*** message to confirm;
   - ***Do you wish to view the Invoice created, no [****invoice number****]?***
9. Click on ***Yes*** to view the Invoice.
   - Click on ***No*** to return to the ***Sales Orders for Customer*** screen.



10. The ***Edit Customer Invoice*** screen will display where you can view or make changes to the Invoice, if required.
11. After making the necessary changes, click on ***Save***.

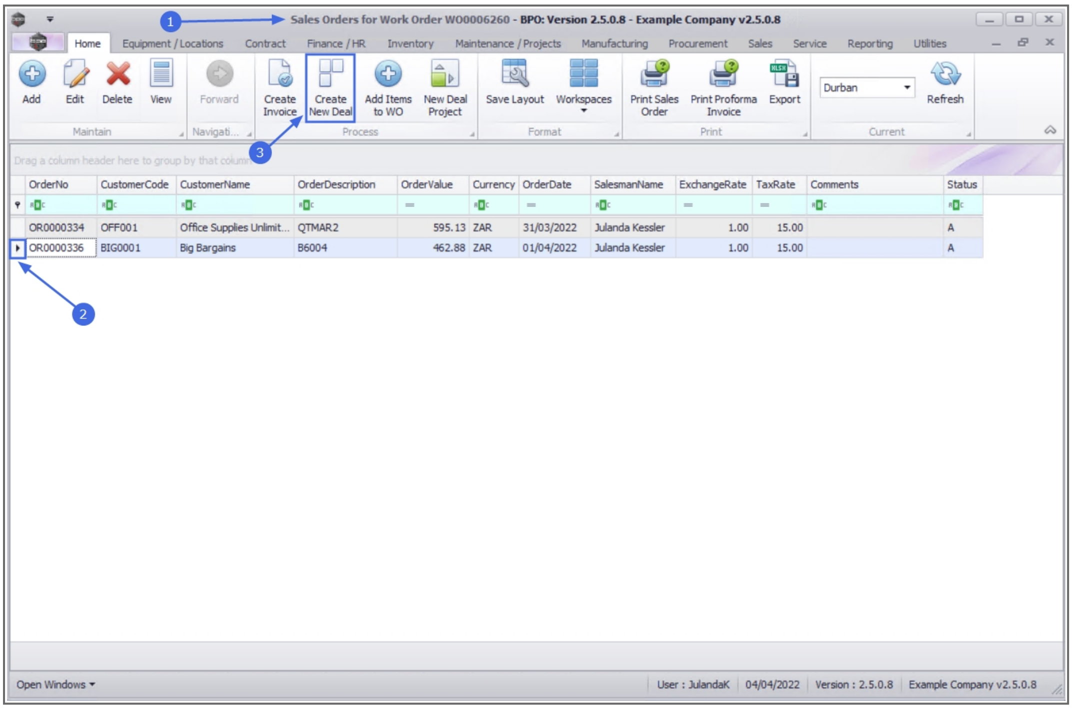
For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



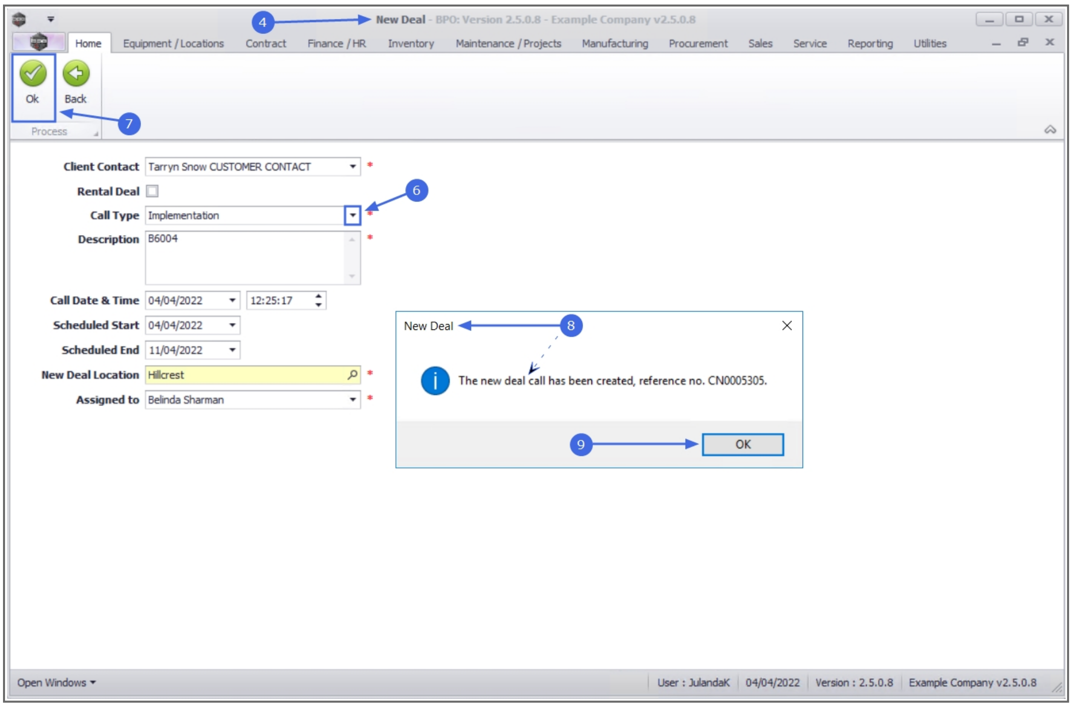
CREATE NEW DEAL

1. From the ***Sales Orders for Work Order*** *[work order number]* screen,
2. Select the ***row*** of the Sales 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. [****ref-erence number****]***
9. Click on ***OK***.



10. You will return to the ***Sales Orders*** screen.

For a detailed handling of this topic refer to Orders - Convert to New Deal Sale / Rental

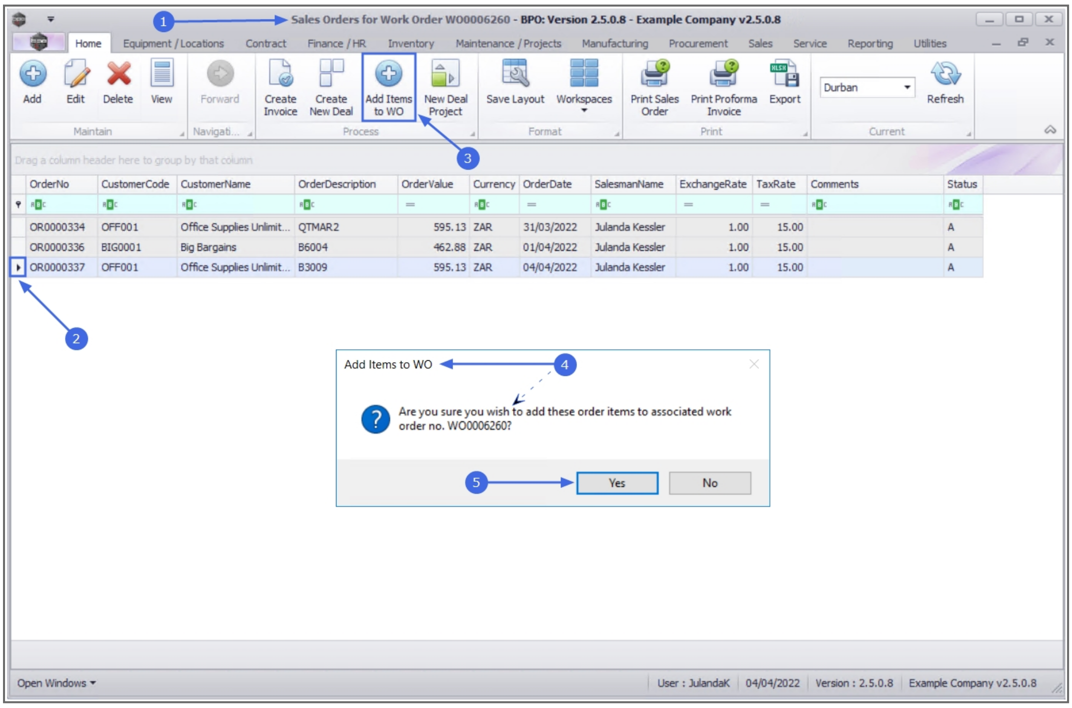
ADD ITEMS TO WORK ORDER

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 Work Order [****work order number****]*** 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 [****work order number****]?***
5. Click on ***Yes***.



6. You will return to the ***Sales Orders for Work Order*** screen.
7. The Work Order items will have been added to the Sales Order.

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

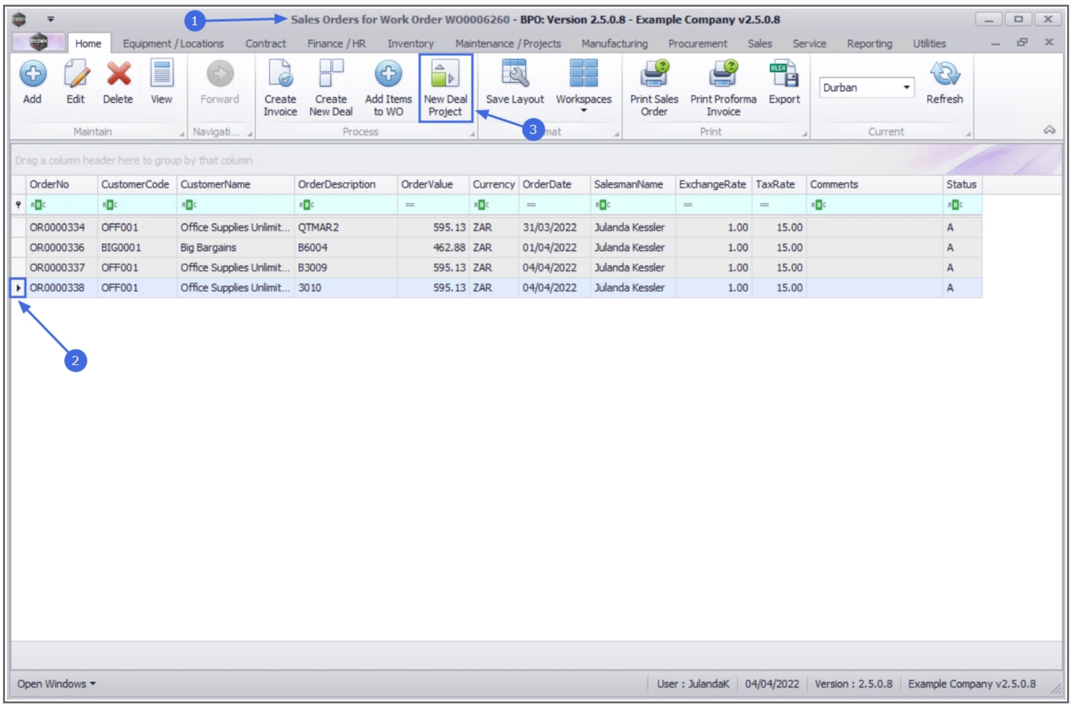
NEW DEAL PROJECT

- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.

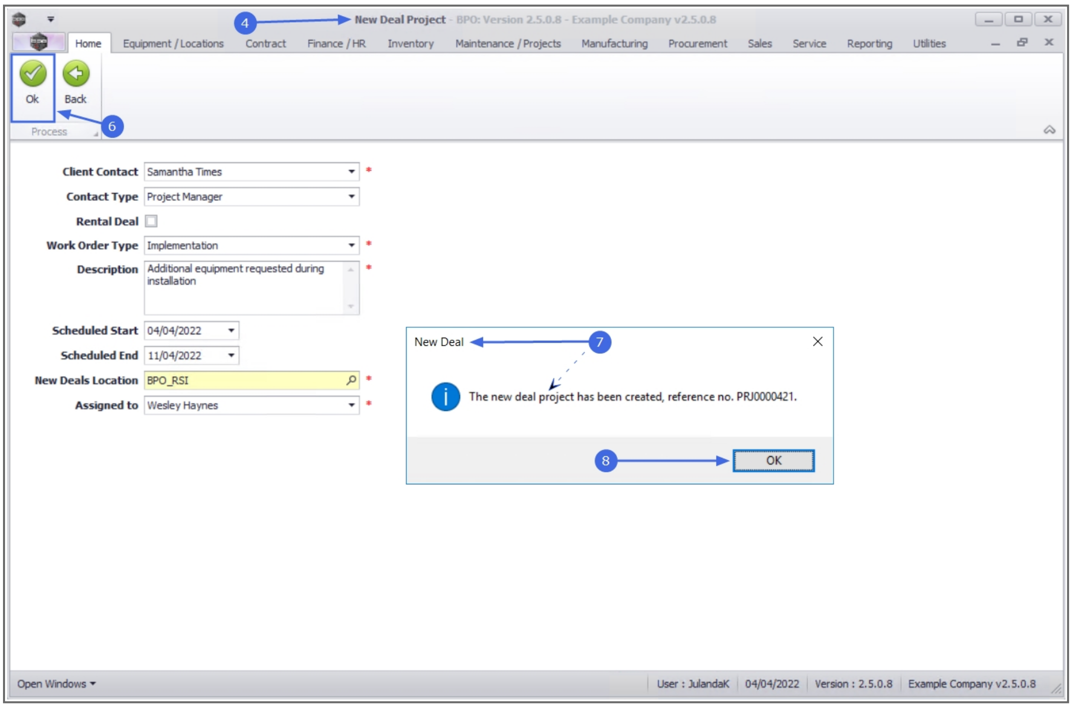
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing 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;
    - ***The new deal project has been created, reference no. [****reference number****]***
8. Click on ***OK***.



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

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 screen
- Add new Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

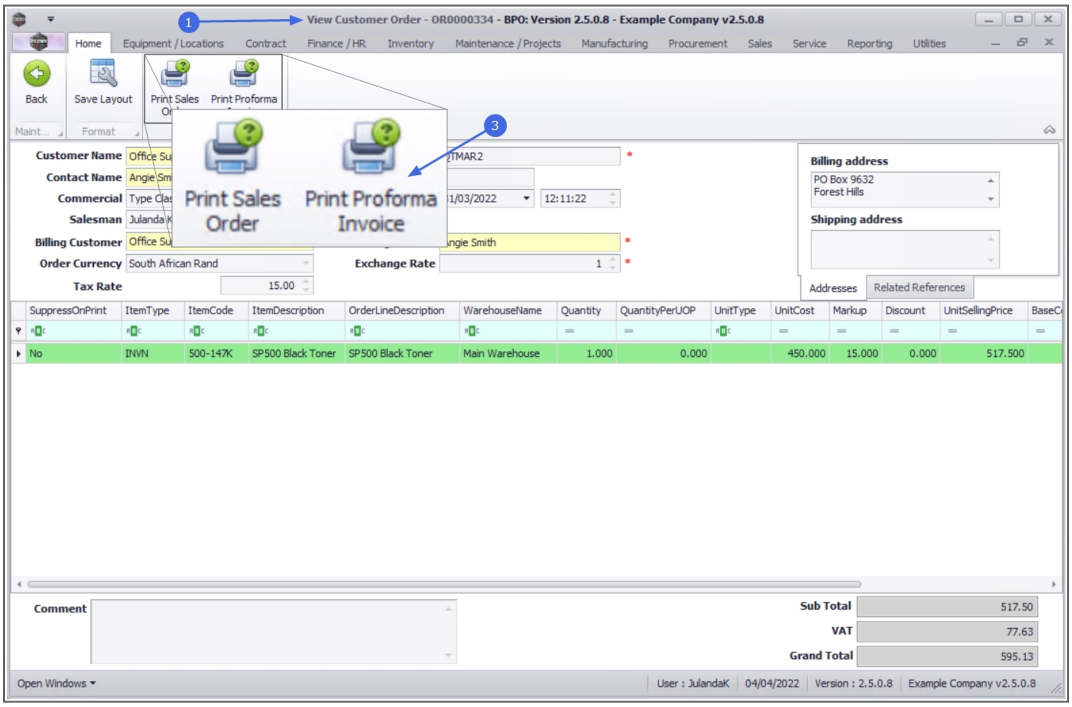
For this example, the proforma invoice will be printed from the ***View Customer Order - [****Order Number****]*** screen. The same procedure can be followed from any of the above mentioned screens.

1. From the ***View Customer Order - [****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.

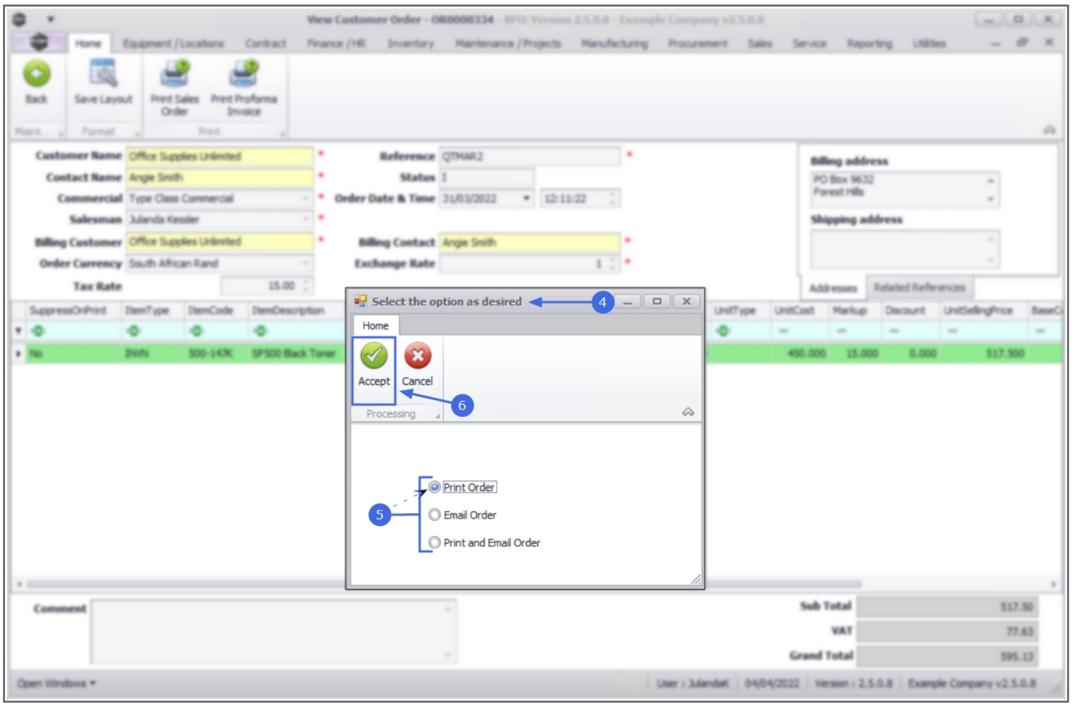


4. The ***Select the option as desired*** message will display.
5. Click on the ***radio button*** to select either ***Print Order***, ***Email Order*** or ***Print and Email Order***.

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

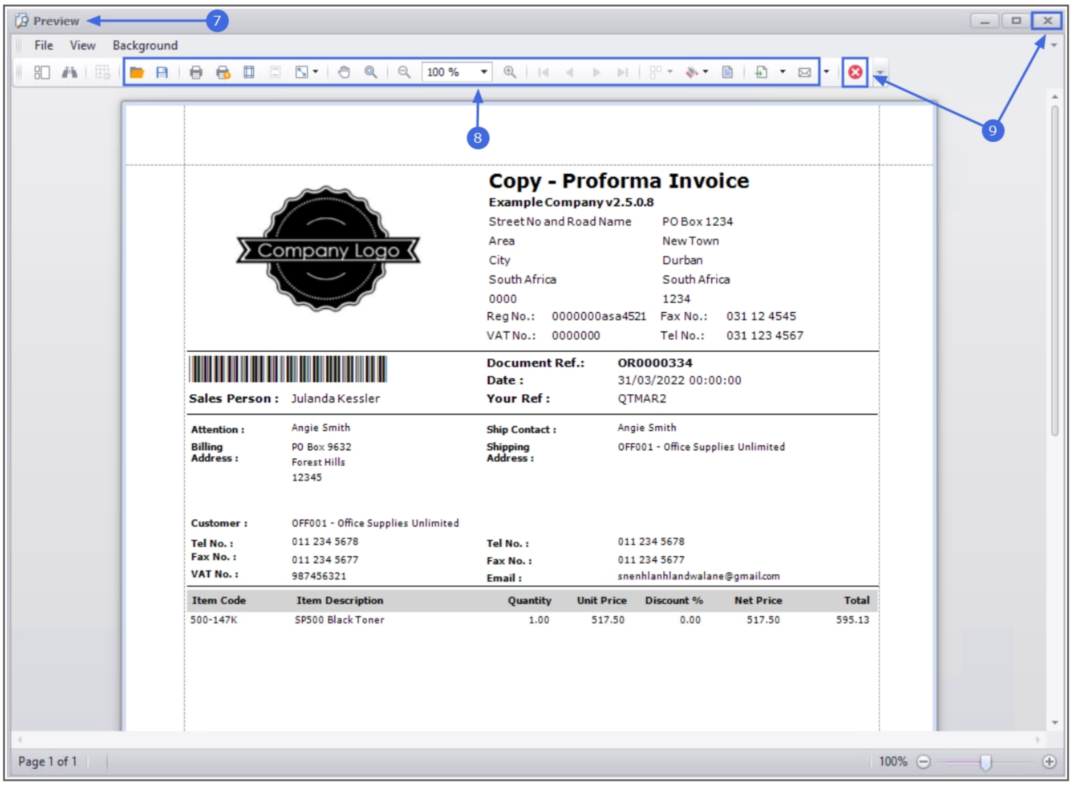
- The example has ***Print Order*** selected.

6. Click on ***Accept*** to proceed.



7. The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the ***Preview*** screen.
8. 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


Preview
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View
Background
Copy - Proforma Invoice
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Street No and Road Name
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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.: OR0000334
Date : 31/03/2022 00:00:00
Sales Person : Julanda Kessler
Your Ref : QTMAR2
Attention : Angie Smith
Billing Address : PO Box 9632 Forest Hills 12345
Ship Contact : Angie Smith
Shipping Address : OFF001 - Office Supplies Unlimited
Customer : OFF001 - Office Supplies Unlimited
Tel No. : 011 234 5678
Fax No. : 011 234 5677
VAT No. : 987456321
Tel No. : 011 234 5678
Fax No. : 011 234 5677
Email : snenhlanhlandwalane@gmail.com
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Item Description
Quantity
Unit Price
Discount %
Net Price
Total
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