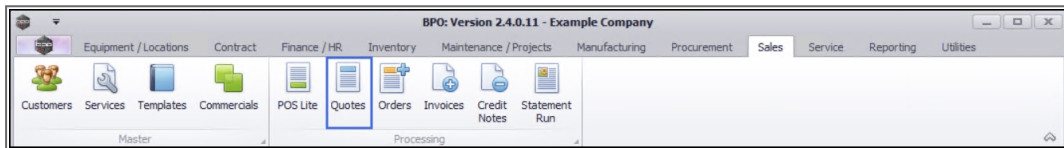


SALES

ORDERS – EDIT SALES ORDER

Ribbon Access: Sales > Orders

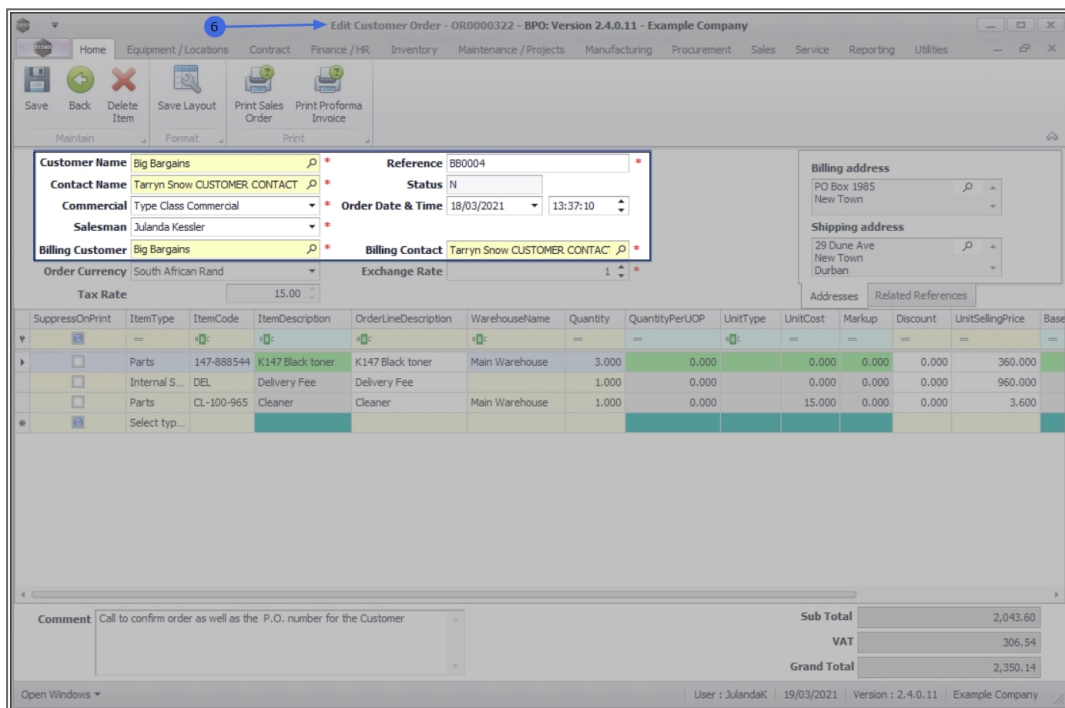


1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where the Sales Order is located.
 - The example has **Durban** selected.
3. To edit an Order ensure that the **Status** is set to **New Order** or **Proforma**.
 - The example has **New Order** selected.
4. Select the **row**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



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

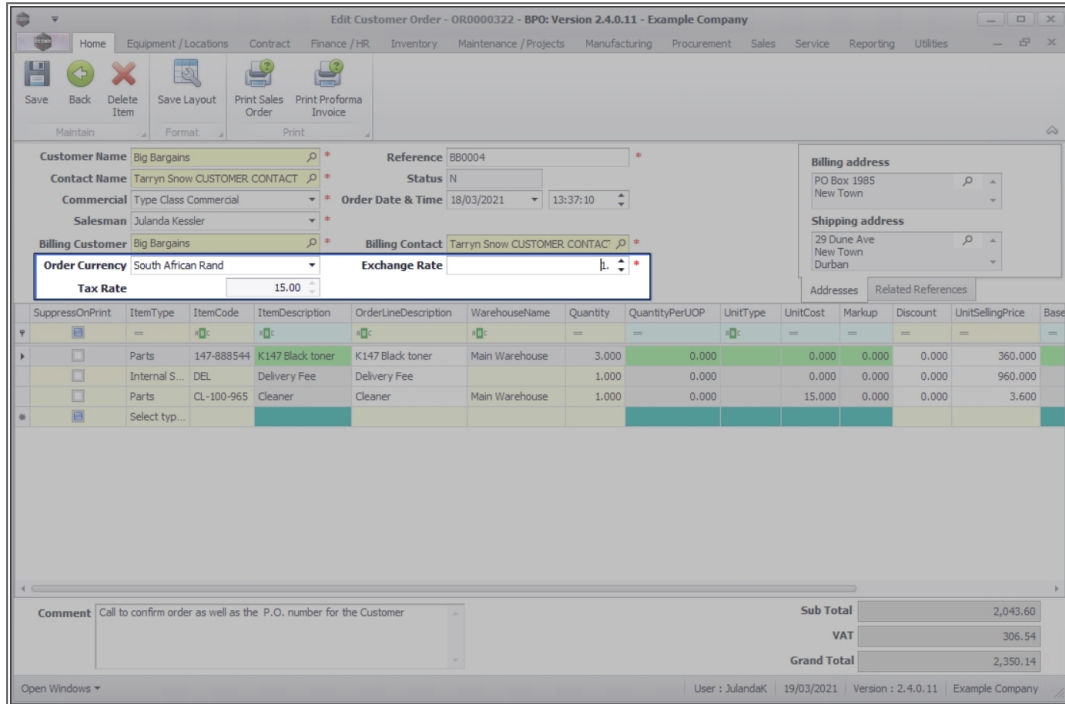
- **Status:** The status for the order will display as **[N]** for **New order** or **[F]** for **Pro-forma**.
- **Order Date and Time:** The date and time the order has been placed, will display.
 - To change the date, type in or click on the arrow to choose an alternative date using the Calendar function.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



FINANCIAL HEADER

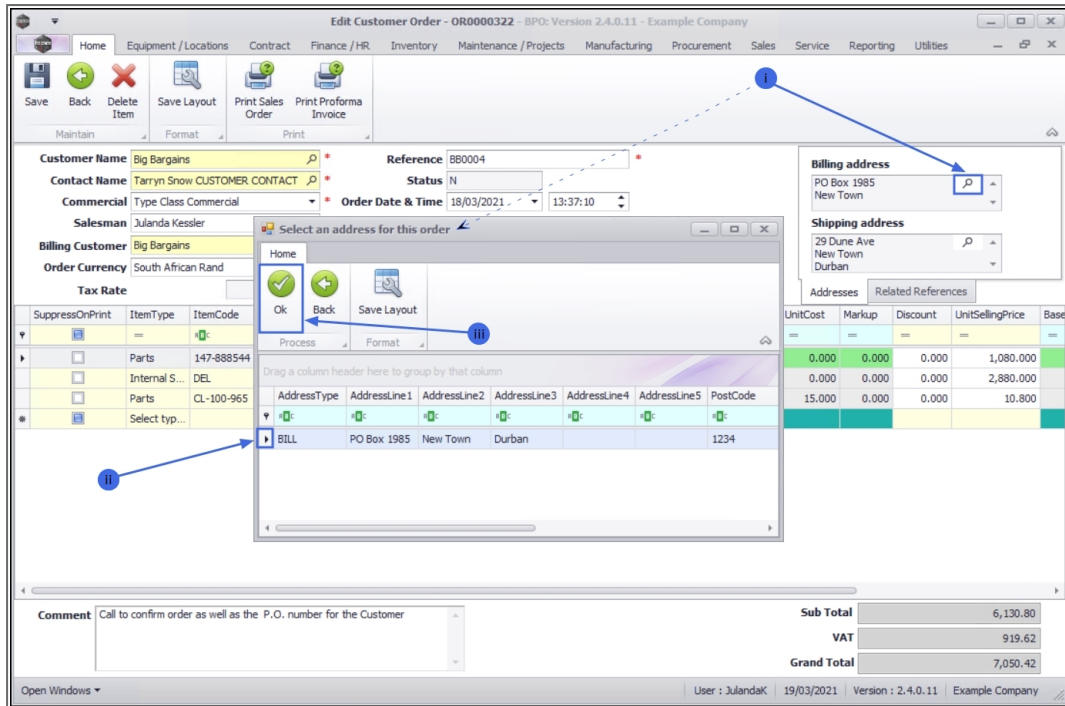
- **Order Currency:** Click on the **search button** to select an alternative currency from the menu.

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

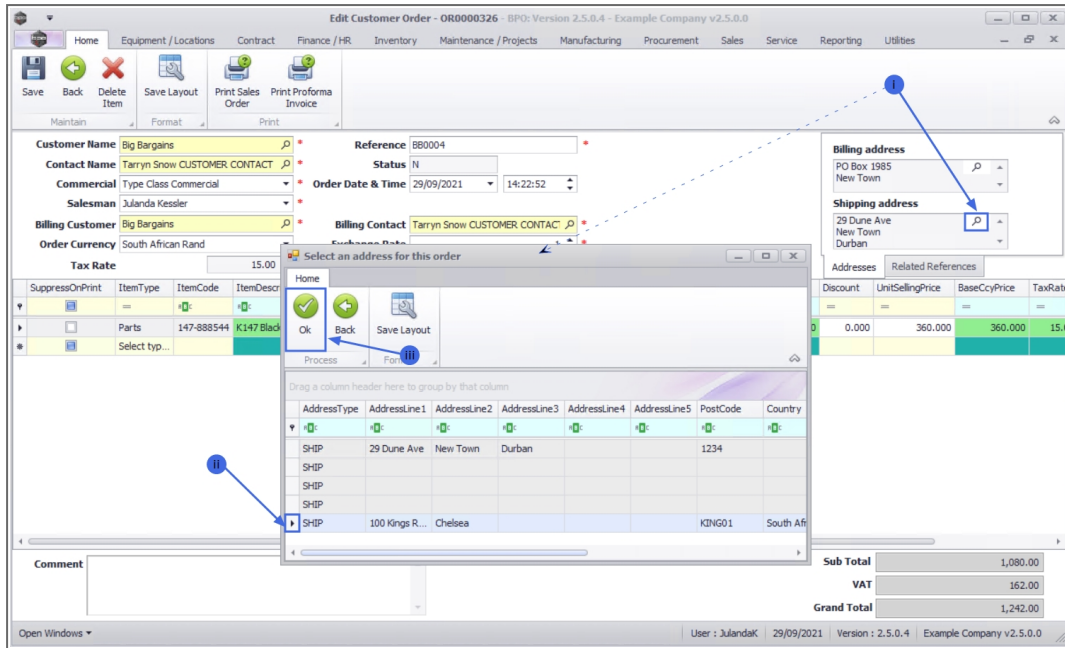


ADDRESSES TAB

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

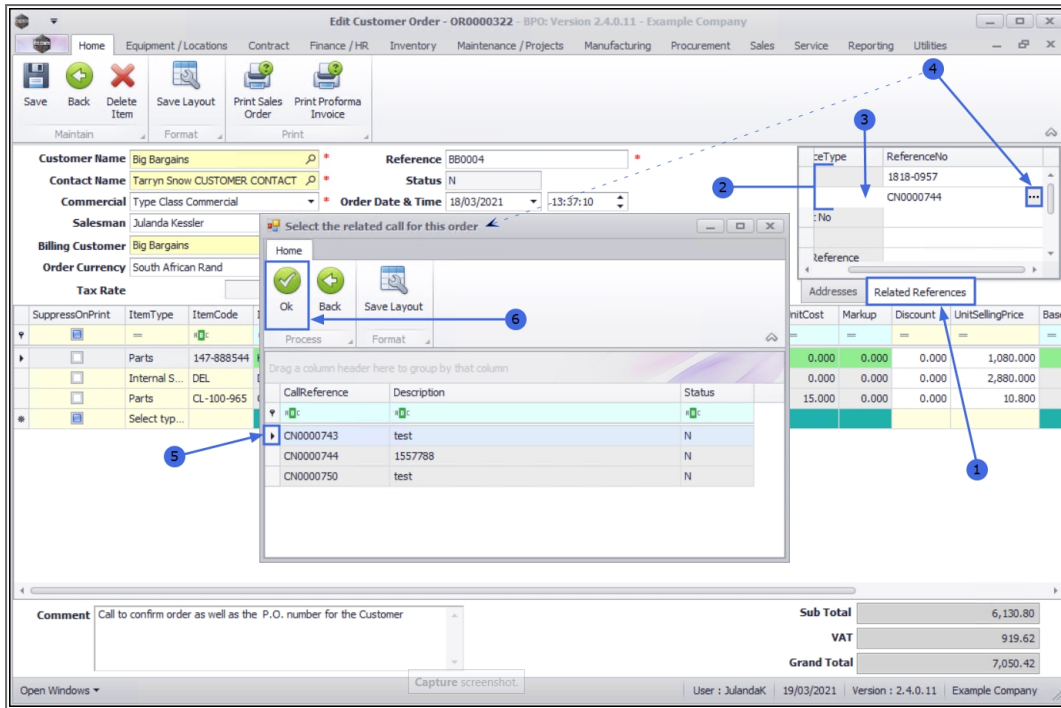


- **Shipping Address:** Ensure that a Shipping Address has been added for the Customer.
 - i. Add or change the shipping address by clicking on the *search* button to display the *Select an address for this order screen*.
 - ii. Click on the **row** of the shipping address you would like to add for this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



RELATED REFERENCES TAB

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



EDIT SALES ORDER ITEMS

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



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

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

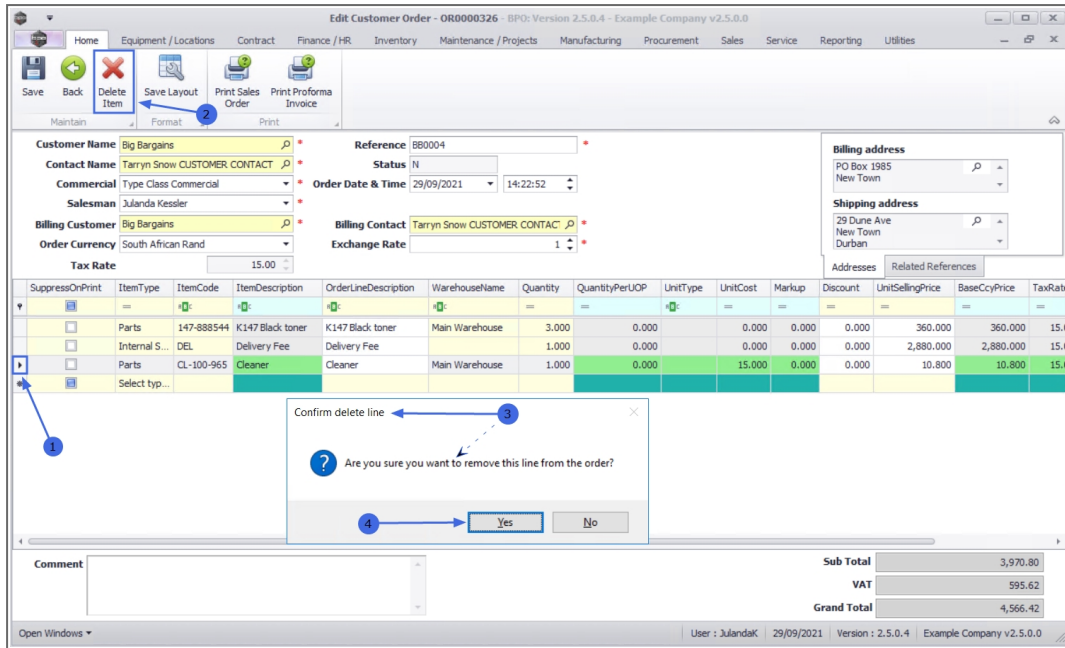
Delete Item line entry

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



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

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



Edit Quantity, Discount and Unit Selling Price

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

SAVE SALES ORDER

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

Related Topics

- [Add a Sales Order](#)
- [Print / Email Sales Order](#)
- [Print Pro-Forma Invoice](#)
- [Create Sales Invoice from Sales Order](#)
- [Create New Deal Sale / Rental \(creates a call\)](#)
- [Create New Deal Project Sale / Rental](#)

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