

# SALES

## ORDERS – CONVERT TO SALES INVOICE

OTC (Over the Counter) Invoices are sales invoices that are created without going through the New Deal Sale process (and therefore the costs are not managed via Work In Progress). This is best used for a Shop Sale environment where a customer is invoiced before the stock or service is collected. This would be for a quick stock sale or internal service. Where delivery, third party services or time would be spent on work, installation or implementation, it is advised to rather follow a [New Deal Sale](#) process.

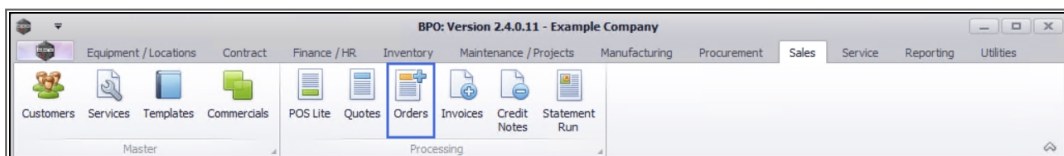
A Sales Quote or Sales Order can be converted to a Sales Invoice, or a Sales Invoice can be created directly. Where stock is invoiced, a part request is created so that the stock can be issued to the invoice - its imperative to have strong controls in place to ensure that stock is issued by the store person.

For a simplified OTC Invoicing process for stock items, see [POS Invoicing](#).

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### *Ribbon Access: Sales > Orders*

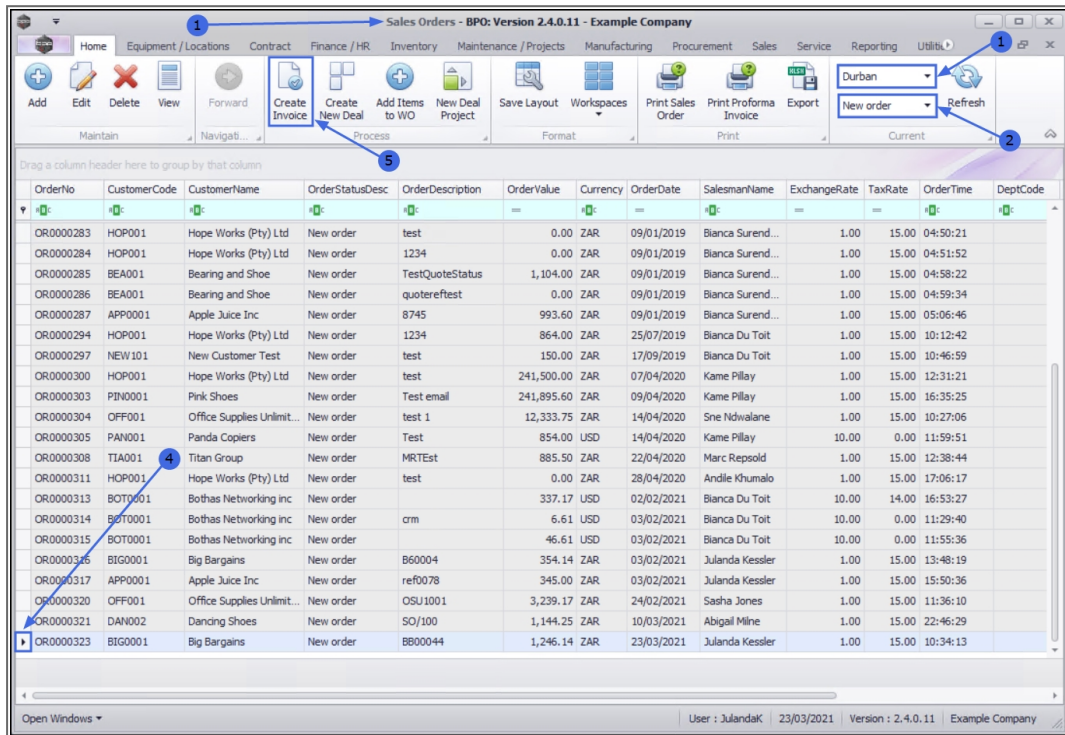
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1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where the Sales Order is located.
  - The example has **Durban** selected.
3. Select the **Status**.
  - The example has **New Order** selected.

4. Select the **row** of the Sales Order that you wish to create an Invoice for.
5. Click on **Create Invoice**.

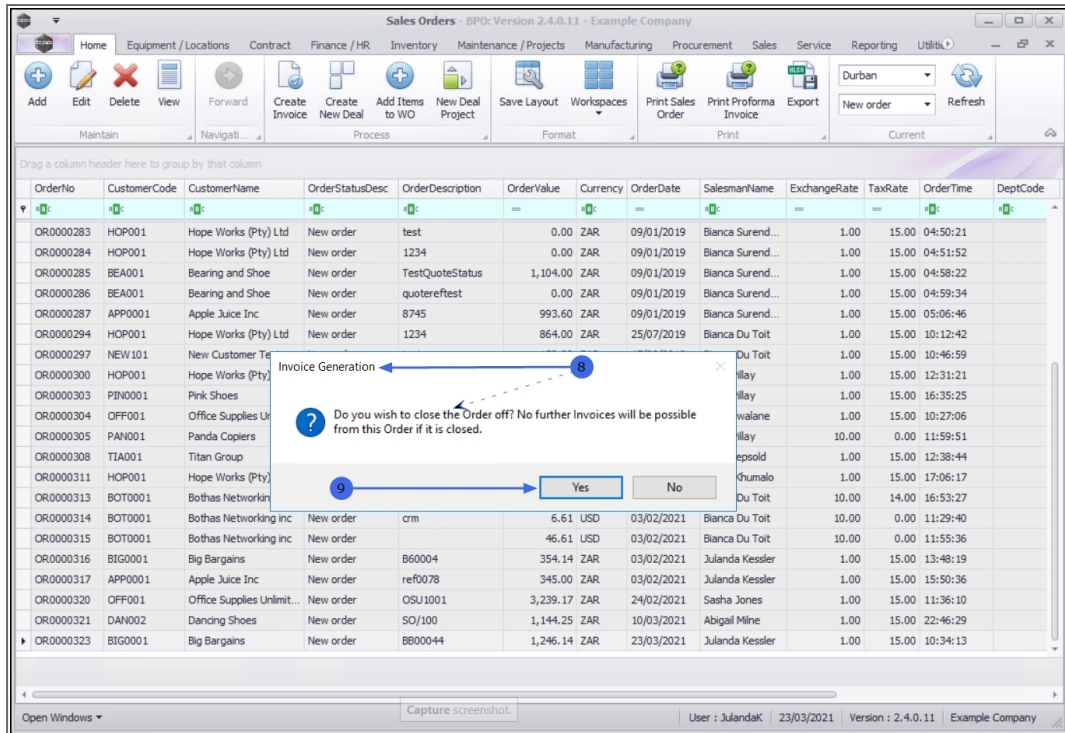
Short cut key: **Right click** to display the **All groups** menu list. Click on **Invoice**.



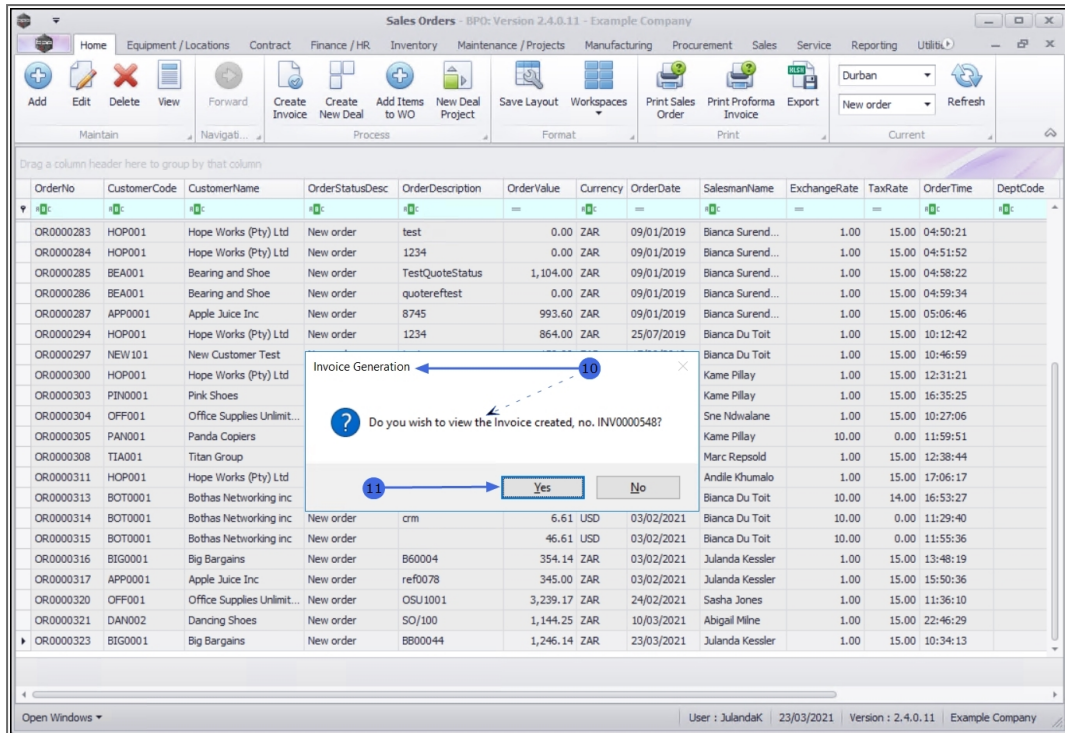
Next you will receive three Invoice Generation messages to confirm.

6. When you receive the first **Invoice Generation** message to confirm;
  - **Do you want to convert order no. OR[order number], for customer, [customer name] to an invoice?**
7. Click on **Yes**.

8. When you receive the second **Invoice Generation** message to confirm;
  - **Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.**
9. Click on **Yes**.



10. When you receive the third **Invoice Generation** message to confirm;
  - **Do you wish to view the Invoice created, no INV[invoice number]?**
11. Click on **Yes** to view the Invoice.
  - Click on **No** to return to the **Sales Orders** screen.
  - The converted Sales Order can now be viewed from the [Sales Invoices listing screen](#).



## VIEW THE CUSTOMER INVOICE

1. If you have selected **Yes** to view the Invoice, then the **Edit Customer Invoice** screen will be displayed.
2. Invoice Items and Item Details can be **Suppressed** or **Hidden** on a Sales Invoice, but you may not want to use this functionality.
  - Please refer to [Suppress Details on Invoice](#) and [Suppress Line Detail on Print](#) for more details.
  - Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.

3. Make the changes that are required, then click on **Save**.



**Note:** You can only edit the invoice if it is still in the New status. In any other status, you will need to raise a credit note if a correction is required.



1 →

2 →

3 →

Customer Name: Big Bargains  
 Contact Name: Tarryn Snow CUSTOMER CONTACT  
 Commercial: Type Class Commercial  
 Salesman: Julanda Kessler  
 Billing Customer: Big Bargains  
 Invoice Currency: South African Rand  
 Tax Rate: 15.00

Reference: BB00044  
 Status: New  
 Date & Time: 23/03/2021 10:55:49  
 Billing Contact: Tarryn Snow CUSTOMER CONTACT  
 Exchange Rate: 1

Billing address: PO Box 1985, New Town  
 Shipping address: 29 Dune Ave, New Town, Durban

Suppress/Print	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCpyPrice
<input type="checkbox"/>	Parts	147-888544	K147 Black toner	K147 Black toner	Main Warehouse		3.000	0.000	0.000	0.000	360.000	360.000
<input type="checkbox"/>	Parts	CL-100-965	Cleaner	Cleaner	Main Warehouse		1.000	15.000	0.000	0.000	3.600	3.600
<input type="checkbox"/>	Internal Service	DEL	Delivery Fee	Delivery Fee			1.000	0.000	0.000	0.000	0.000	0.000

Comment: Call to confirm order as well as the P.O number for the Customer

Sub Total: 1,083.60  
 VAT: 162.54  
 Grand Total: 1,246.14

User: JulandaK | 23/03/2021 | Version: 2.4.0.11 | Example Company

- You will return to the **Sales Orders** listing screen.
- The Sales Order that you converted into an Invoice can now be viewed from the [Sales Invoices listing screen](#).

## Related Topics

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

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