

SALES

ORDERS - ADD ITEMS TO WORK ORDER

A quote may be created from a project, call or work order, where additional billable work is required. The quote can be converted to a sales order, and parts required will automatically be added as part requests on the originating work order, when selecting 'Add Items to WO'.

Ribbon Access: Sales > Orders

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	Equipment /	Locations	Contract	Finance	HR.	Inventory	Maint	enance /	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
<u>.</u>	Z		-			F	¢								
Customers	Services T	emplates	Commercials	POS Lite	Quotes	Orders	Invoices	Credit Notes	Statement Run						
	Maste	er	4			Proce	essing			4					$\hat{\sim}$

- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where the Sales Order can be located.
 - The example has *Durban* selected.
- 3. The *Status* must be set to **New Order**.
- Click on the *row* of the *sales order* for which you wish to *add items* to the work order.
- 5. Click on Add Items to WO.



Orders - Add Items to Work Order

-	dd Edit	Delete View	Forward Creat	e Create Add e New Deal to	I Items New Deal Project	Save Layout	+	Print Sales Order	Print Proforma Invoice	Export New	order	Refresh	1	
Der	Maint		a Navigati a	Process		Formal	:	4	Print	.4	Currer	nt		4
	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCod	de
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	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
	OR0000303	PIN0001 4	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
	OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
	OR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
	OR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
	OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
	OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
	OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
1	OR0000316	BIG0001	Big Bargains	New order	B60004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
۲	OR0000317	APP0001	Apple Juice Inc	New order	ref0078	345.00	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	15:50:36		
	OR0000320	OFF001	Office Supplies Unlimit	New order	OSU1001	3,239.17	ZAR	24/02/2021	Sasha Jones	1.00	15.00	11:36:10		
	OR0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		

- 6. When you receive the *Add Items to WO* to confirm;
 - Are you sure you wish to add these order items to associated work order no. WO[work order number]?
- 7. Click on Yes, i f you are certain about your selection,



A	dd Edit	Delete View	Forward Creat		Items New Deal WO Project	Save Layout V	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export Nev	ban v order	 Refresh 		
	Main	tain	A Navigati	Process		Format			Print	4	Currer	nt .	4	4
	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCod	de
	REC.	REC			REC	=	REC	=		=	=	NBC	RBC	-
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51	-	
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00		09/01/2019	Bianca Surend	1.00		04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test		ZAR	09/01/2019	Bianca Surend	1.00		04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00		04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
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	OR0000300	HOP001	Hope Works (Pty) Lt		1			e Pillay	1.00	15.00	12:31:21			
	OR0000303	PIN0001					ns to assoc	ciated work	e Pillay	1.00	15.00	16:35:25		
	OR0000304	OFF001	Office Supplies Unlin	order no.	WO0001499?					1.00	15.00	10:27:06		
	OR0000305	PAN001	Panda Copiers						e Pillay	10.00	0.00	11:59:51		
	OR0000308	TIA001	Titan Group	7		Yes		No	Repsold	1.00	15.00	12:38:44		
	OR0000311	311 HOP001 Hope Works (Pty) Lt			165		INO	le Khumalo	1.00	15.00	17:06:17			
	OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
	OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
	OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
	OR0000316	BIG0001	Big Bargains	New order	B60004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
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	OR0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		

The Sales Order items have been added to the linked Work Order.

Related Topics

- Add a Sales Order
- Edit / Delete / View a Sales Order
- Print / Email Sales Order
- Print Pro-Forma Invoice
- <u>Create Sales Invoice from Sales Order</u>
- <u>Create New Deal Project Sale / Rental</u>

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