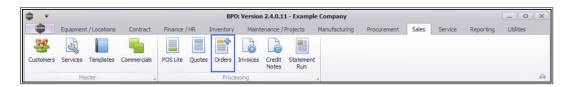


SALES

ORDERS - VIEW SALES ORDER

Ribbon Access: Sales > Orders



- 1. The *Sales Orders* listing screen will be displayed.
- 2. Ensure that the correct *Site* and *Status* have been selected.
 - The example has *Durban* as the site and *New Order* as the status selected.
- 3. Click in the *row* of the Sales Order that you wish to view.
- 4. Click on *View*.

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T	OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	
P	a 🖬 c	• • •	8 0 0	R O C	R C	-	* 0 0		R C	-	-	10c	* 0 ¢	
T	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
1	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
1	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		
	OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
	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 3	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	TI4001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
	OR0000311	OP001	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		
	OR000031	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
	OR0000715	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		
	OR0000317	APP0001	Apple Juice Inc	New order	ref0078	345.00	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	15:50:36		
	R0000320	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		
-	OR0000322	BIG0001	Big Bargains	New order	BB0004	6,677.82	ZAR	18/03/2021	Julanda Kessler	1.00	15.00	13:37:10		



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

This is a *View only* screen and you will not be able to make changes to any of the customer details, billing details, related references or the item details for this sales order.

6. You can however Orders - Print Sales Order or Orders - Print Proforma Invoice from this screen.

Contact Comm Sale Billing Cust	Name Big Bargain Name Tarryn Sou ercial Type Class sman Julanda Ke omer Big Bargain	ow CUSTOMER Commercial essler		-	4]•]]•			g address iox 1985 Town ping address une Ave Town		*	
	Rate	can Rand	15.00 🗘	Exchange Rate		1 🗘			Addre		ated Referenc	es	_
SuppressOnP	int ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	В
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No	INVN	147-888544	K147 Black toner	K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	10.000	1,080.00)
No	SERV	DEL	Delivery Fee	Delivery Fee		1.000	0.000		0.000	0.000	0.000	2,880.00	5
No	INVN	CL-100-965	Cleaner	Cleaner	Main Warehouse	1.000	0.000		15.000	0.000	0.000	10.80)

7. Click on *Back* to return to the Sales Orders listing screen.

FORWARD NAVIGATION BUTTON

The *Forward* navigation button is only available in the <u>Invoiced Order</u> status. This feature enables the user to quickly find the related documentation by navigating to any downstream process documents related to the selected order e.g. the linked Sales Invoice or the related new deal Call or Project.



- 1. In the Sales Orders listing screen,
- 2. Ensure that you have selected the correct *Site*.
- 3. Change the *Status* to *Invoiced order*.
- 4. Click on the *row* of the *Invoiced Order* that you wish to view.
- 5. Click on *Forward*.

	- Factoria	1		Sales Orders - BPO:					Consider D		Like	2 .	×
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n C	×Oc	10:	1 0 0	100	-	* 0 ¢	-	* D ¢	-	-	* D ¢	* 0 ¢	
OR0000001	HOP001	Hope Works (Pty) Ltd	Invoiced order	New SP2020 Machi	28,500.00	ZAR	03/04/2014	Belinda Sharman	1.00	14.00	13:56:03		
OR0000002	HOP001	Hope Works (Pty) Ltd	Invoiced order	new machine	28,500.00		03/04/2014	Belinda Sharman	1.00		15:36:04		
OR000003	HOP001	Hope Works (Pty) Ltd	Invoiced order	Adhoc machine sale	3,605.25	ZAR	04/04/2014	Belinda Sharman	1.00	14.00	15:47:13		
OR0000004	DER001	Derton / Technologies	Invoiced order	Single machine sal	8,958.50	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	14:07:59		
OR0000005	HOP001	Hope Works (Pty) Ltd	Invoiced order	New Machine	13,110.00	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	14:52:37		
OR0000006	DER001	Derton / Technologies	Invoiced order	Machine installation	20,059.44	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	16:29:26		
OR0000007	OFF001	Office Supplies Unlimit	Invoiced order	test	13,110.00	ZAR	11/04/2014	Belinda Sharman	1.00	14.00	10:32:45		
OR000008	OFF001	Office Supplies Unlimit	Invoiced order	Mono machine inst	10,488.00	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	11:47:58		
OR000009	OFF001	Office Supplies Unlimit	Invoiced order	New machine instal	5,571.75	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	14:51:02		
OR0000010	OFF001	Office Supplies Unlimit	Invoiced order	New machine sale	5,571.75	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	15:34:36		
OR0000011	OFF001	Office Supplies Unlimit	Invoiced order	COR 14521	18,753.00	ZAR	06/05/2014	Belinda Sharman	1.00	14.00	10:38:08		
OR0000012	YES001	Young Electric	Invoiced order	C03 123456	2,308.50	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	10:38:11		
OR0000013	YES001	Young Electric	Invoiced order	C03 122346	28,946.03	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	10:59:20		
OR0000014	DER001	Derton / Technologies	Invoiced order	COR 12541	28,958.85	ZAR	06/05/2014	Belinda Sharman	1.00	14.00	13:46:05		
OR0000015	YES001	Young Electric	Invoiced order	INV 123456	2,261.48	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	13:46:13		
OR0000016	YES001	Young Electric	Invoiced order	abc123	16,769.40	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	14:53:16		
OR0000017	HOP001	Hope Works (Pty) Ltd	Invoiced order	test contract proje	19,665.00	ZAR	07/05/2014	Belinda Sharman	1.00	14.00	14:03:37		
OR0000018	DER001	Derton / Technologies	Invoiced order	test	19,665.00	ZAR	07/05/2014	Belinda Sharman	1.00	14.00	15:34:37		
OR0000019	WES001	Westwood Dynamic	Invoiced order	New machine instal	10,488.00	ZAR	09/05/2014	Belinda Sharman	1.00	14.00	13:59:25		
OR0000021	TIA001	Titan Group	Invoiced order	COR 4125	17,100.00	ZAR	16/05/2014	Belinda Sharman	1.00	14.00	08:34:37		

 The *Edit project : PRJ[]* screen will open as the selected Sales Order is linked to a Project.

The down navigation will view a New Deal Call screen or the View Order screen, if the Sales Order is linked to one of those.

7. Click on *Back* to return to the Sales Quotes listing screen.



• •	1	Edit p	roject : PRJ00	000005 - BPO: \	/ersion 2.4.0.11 -	Example Company	,				D X
Home Equipmen	t / Locations Contract	Finance / HR	Inventory	Maintenance / P	rojects Manufac	turing Procureme	nt Sales	Service	Reporting Utili	ties —	₽ X
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				-			T	el No.	031 123 4785		4 Linked work Orders
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Open Windows 🕶						User :	JulandaK 19	/03/202	Version : 2.4.0.1	1 Example Cor	mpany

Related Topics

- Add a Sales Order
- Print / Email Sales Order
- Print Pro-Forma Invoice
- <u>Create Sales Invoice from Sales Order</u>
- <u>Create New Deal Sale / Rental (creates a call)</u>
- Create New Deal Project Sale / Rental

MNU.126.010