

SALES

INTRODUCTION TO ORDERS

A **Sales Order** is an internal document that specifies the details about the product or services ordered by a customer.

Information such as: price, quantity, buyer details, shipping address, billing address, terms and conditions, and mode of payment is included in the Sales Order.

- You can convert a [Sales Quote](#) into a Sales Order.
- You can create a Sales Order directly without raising a Quote.

Ribbon Select **Sales > Orders**

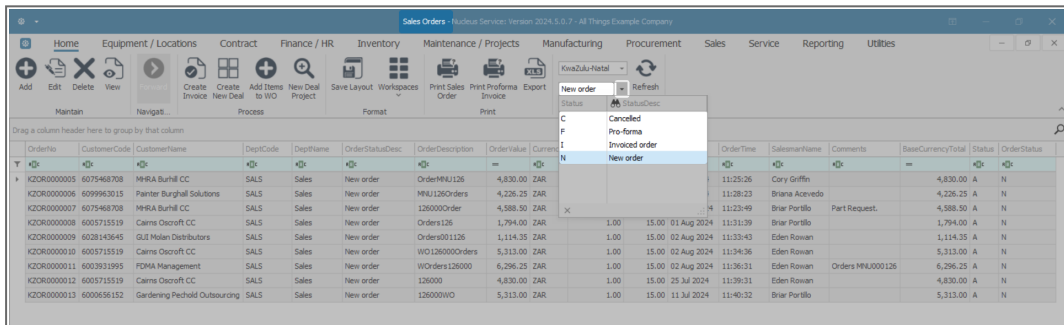


- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the order can be located.
 - The example has **KwaZulu-Natal** selected.

OrderNo	CustomerCode	CustomerName	DeptCode	DeptName	OrderStatus	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	SalesmanName	Comments	BaseCurrencyTotal	Status	OrderStatus
KZOR000005	6075468708	MHRA Burhill CC	SALS	Sales	New order	OrderMHU126	4,830.00	ZAR	1.00	15.00	30 Jul 2024	11:25:26	Cory Griffin		4,830.00	A	N
KZOR000006	6099963015	Painter Burghall Solutions	SALS	Sales	New order	MNU126Orders	4,226.25	ZAR	1.00	15.00	05 Jul 2024	11:28:23	Briana Acevedo		4,226.25	A	N
KZOR000007	6075468708	MHRA Burhill CC	SALS	Sales	New order	126000Order	4,588.50	ZAR	1.00	15.00	02 Aug 2024	11:23:49	Briar Portillo	Part Request.	4,588.50	A	N
KZOR000008	6005715519	Cams Osocroft CC	SALS	Sales	New order	Orders126	1,794.00	ZAR	1.00	15.00	01 Aug 2024	11:31:39	Briar Portillo		1,794.00	A	N
KZOR000009	6028143645	GUJ Molan Distributors	SALS	Sales	New order	Orders001126	1,114.35	ZAR	1.00	15.00	02 Aug 2024	11:33:43	Eden Rowan		1,114.35	A	N
KZOR000010	6005715519	Cams Osocroft CC	SALS	Sales	New order	WO126000Orders	5,313.00	ZAR	1.00	15.00	02 Aug 2024	11:34:36	Eden Rowan		5,313.00	A	N
KZOR000011	6003931995	FDMA Management	SALS	Sales	New order	WOOrders126000	6,296.25	ZAR	1.00	15.00	02 Aug 2024	11:36:31	Eden Rowan		6,296.25	A	N
KZOR000012	6005715519	Cams Osocroft CC	SALS	Sales	New order	126000	4,830.00	ZAR	1.00	15.00	25 Jul 2024	11:39:31	Eden Rowan		4,830.00	A	N
KZOR000013	6000656152	Gardening Pechold Outsourcing	SALS	Sales	New order	126000WO	5,313.00	ZAR	1.00	15.00	11 Jul 2024	11:40:32	Briar Portillo		5,313.00	A	N

SELECT THE STATUS

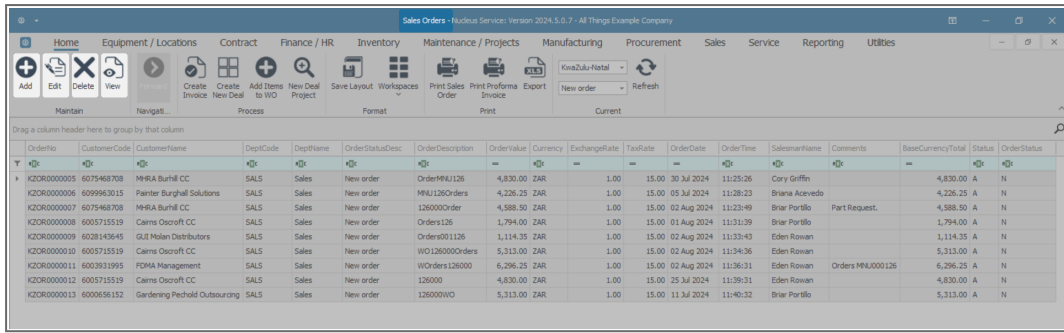
- The list of all the Sales Orders will be filtered using the **Site** and **Status** selected.
- This screen will open in the **New order** status by default.
- Click on the **drop-down arrow** to select one of the Status menu options:
 - **C - Cancelled**
 - **F - Proforma**
 - **I - Invoiced**
 - **N - New order**



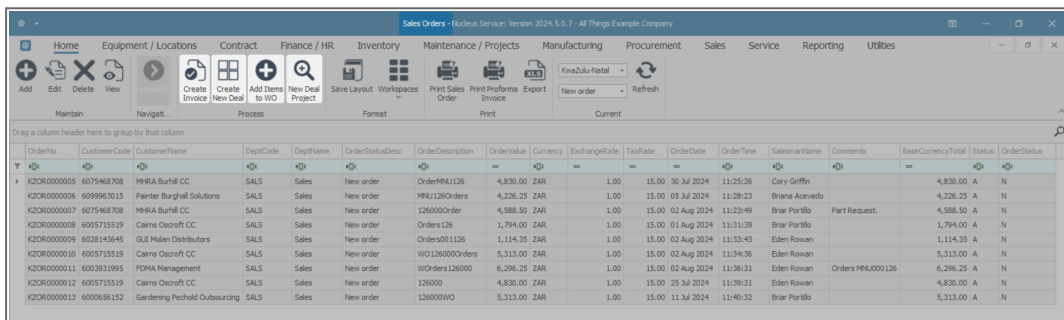
THE RIBBON ACTION BUTTONS

The Sales Orders ribbon action buttons will be available (**bold**) or unavailable (**greyed out**) depending on the status selection.

- From this screen you can **Add**, **Edit**, **Delete**, **View**.
- Note that the **Forward** navigation button is **greyed out**. This feature is only available in the **Printed Status**.

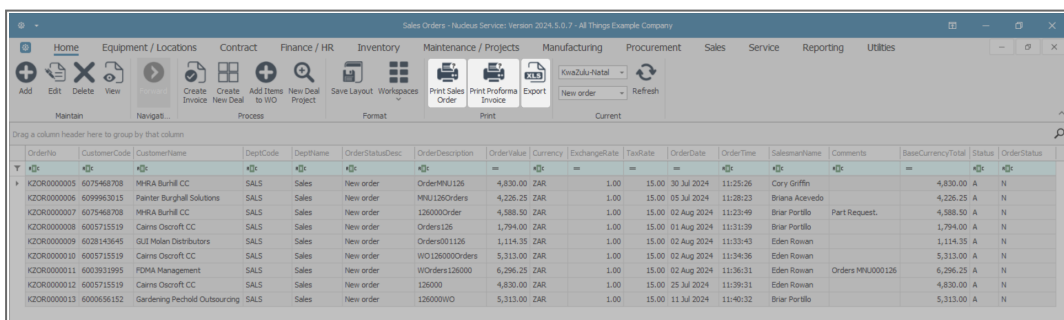


- From this screen you can also [Create Invoice](#), [Create New Deal](#), [Add Items to Work Order](#) or create a [New Deal Project](#).



PRINT OPTIONS

- You can [Print Sales Order](#) or [Print Proforma Invoice](#).
- The **Export** feature allows you to export a list of the Sales Orders in the selected Status to an Excel Spreadsheet where it can be printed.



Related Topics

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

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