We are currently updating our site; thank you for your patience.

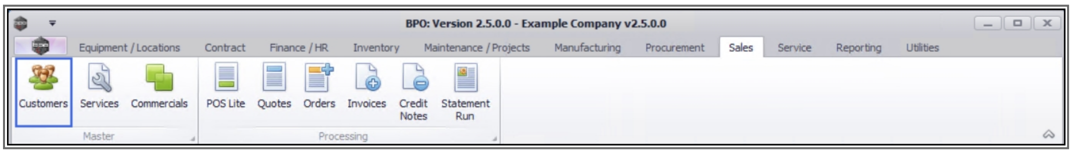
SALES

CUSTOMERS – ORDERS

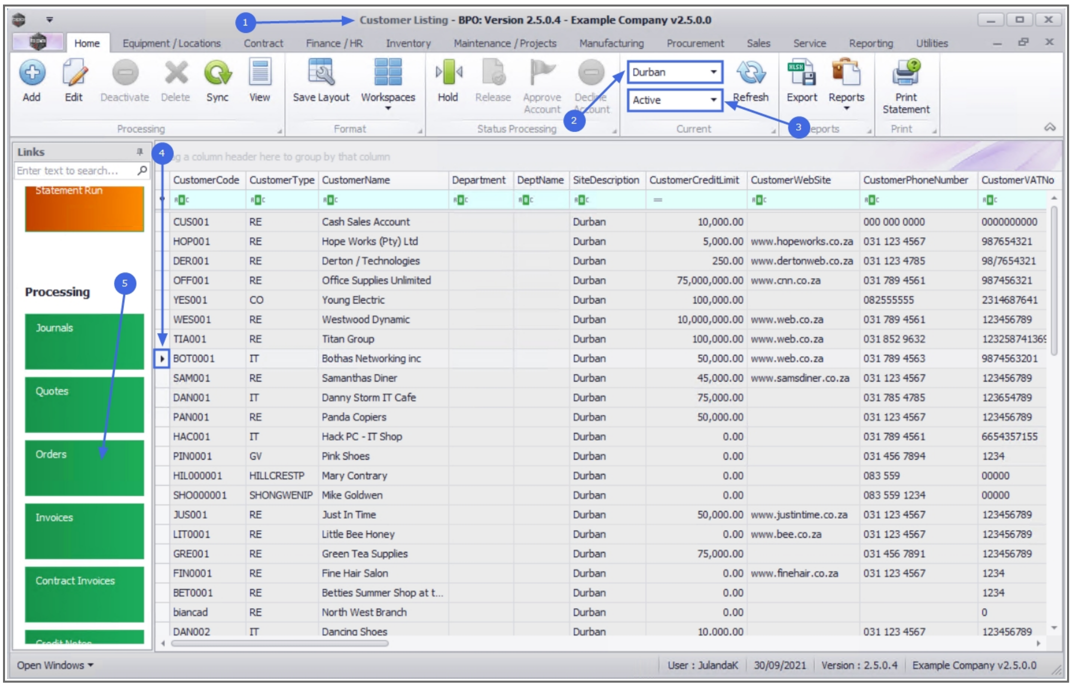
The **Orders** tile direct you to a list of Sales Orders for a selected Customer.

This manual is a brief look at Sales Orders, accessed from the **Customer Listing** screen. For a detailed handling of the topic click on the link to redirect to the Sales Orders manual.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
    - The example has **Durban** selected.
3. Select the **Status** for the customer.
    - The example has **Active** selected.
4. Select the **row** of the **customer** whose sales orders you wish to work with.
5. Click on the **Orders** tile.



6. The **Sales Orders for Customer [**Customer Code**]** screen will be displayed.

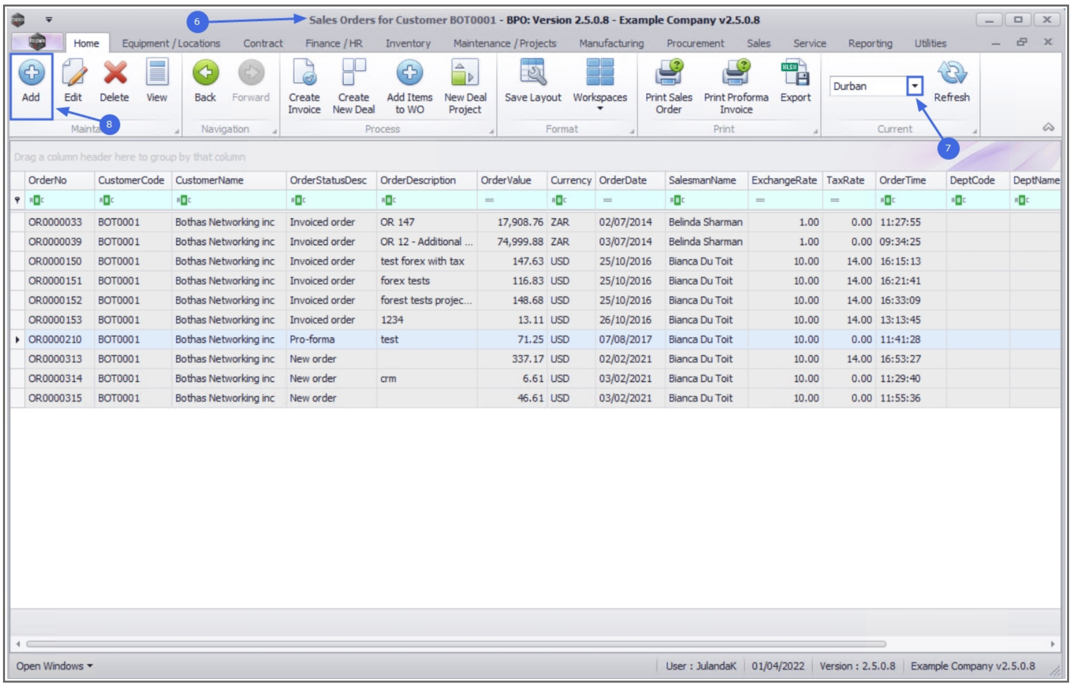
> The **Site** from the Customer Listing screen will not automatically pull through to the **Sales Orders for Customer** screen.

7. Click on the **arrow** to change the **Site** filter.
   - The **Sales Orders for Customer** listing screen will be updated with the Customer Orders for the selected site.

ADD SALES ORDER

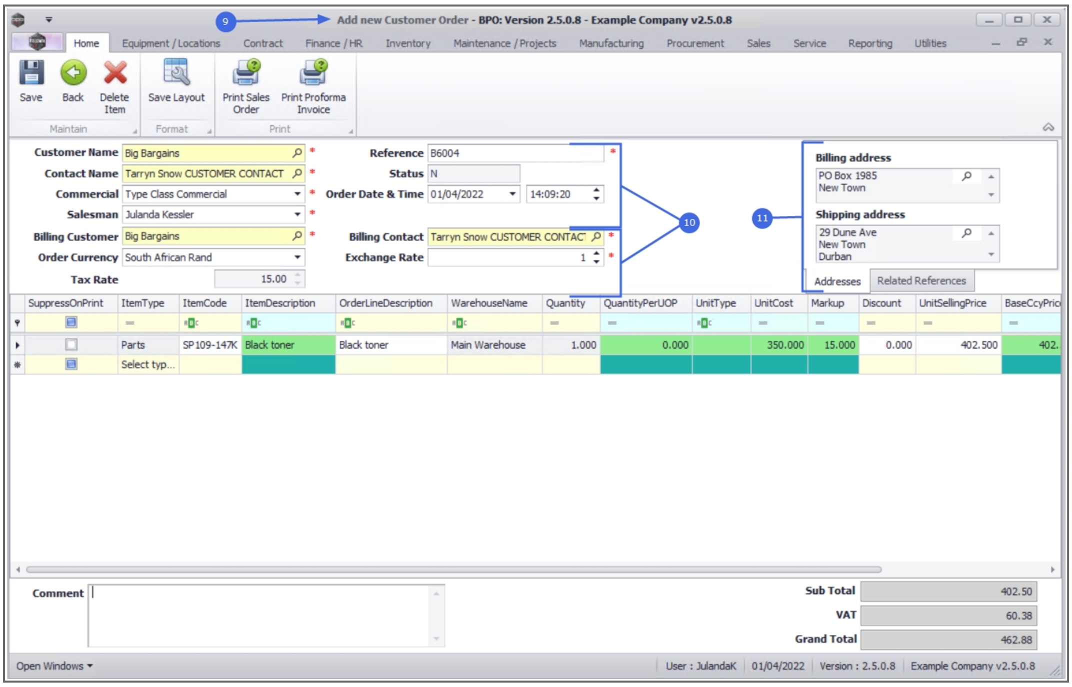
8. Click on **Add**.

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



OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	DeptName
OR0000033	BOT0001	Bothas Networking inc	Invoiced order	OR 147	17,908.76	ZAR	02/07/2014	Belinda Sharman	1.00	0.00	11:27:55		
OR0000039	BOT0001	Bothas Networking inc	Invoiced order	OR 12 - Additional ...	74,999.88	ZAR	03/07/2014	Belinda Sharman	1.00	0.00	09:34:25		
OR0000150	BOT0001	Bothas Networking inc	Invoiced order	test forex with tax	147.63	USD	25/10/2016	Bianca Du Toit	10.00	14.00	16:15:13		
OR0000151	BOT0001	Bothas Networking inc	Invoiced order	forex tests	116.83	USD	25/10/2016	Bianca Du Toit	10.00	14.00	16:21:41		
OR0000152	BOT0001	Bothas Networking inc	Invoiced order	forest tests projec...	148.68	USD	25/10/2016	Bianca Du Toit	10.00	14.00	16:33:09		
OR0000153	BOT0001	Bothas Networking inc	Invoiced order	1234	13.11	USD	26/10/2016	Bianca Du Toit	10.00	14.00	13:13:45		
OR0000210	BOT0001	Bothas Networking inc	Pro-forma	test	71.25	USD	07/08/2017	Bianca Du Toit	10.00	0.00	11:41:28		
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		

9. The **Add new Customer Order** screen will be displayed.
10. Complete the **Sales Order Header** and the **Financial Header** Information.
11. Confirm the **Billing and Shipping Addresses** for the customer, if these fields were not auto populated when you entered the order header information.



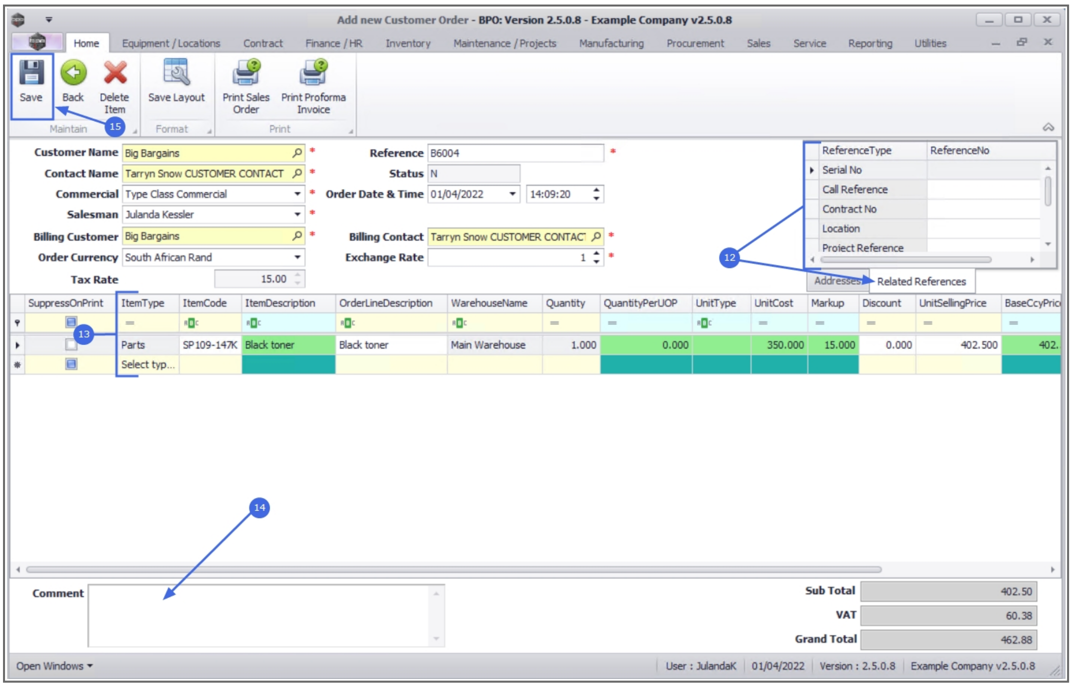
RELATED REFERENCES

12. Click on the **Related References** tab to link the reference information for the customer Order.

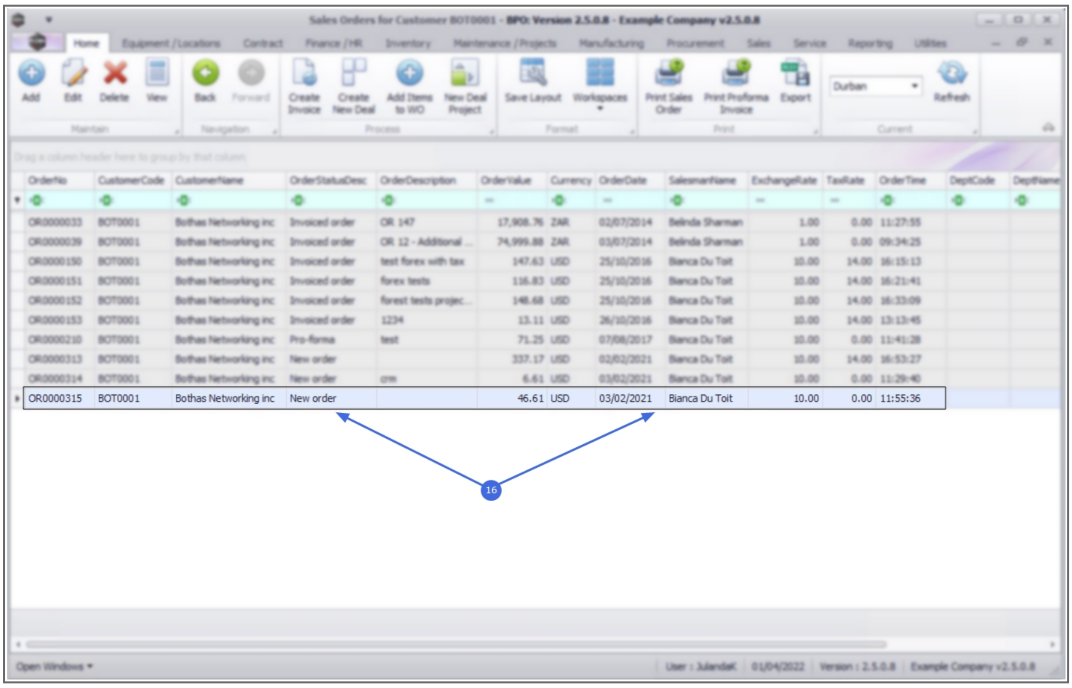
LINE ITEMS AND COMMENTS

13. "Add Sales Order Items" on page 11 as required.
14. Click in the **Comments text box** to type a comment related to the Order.
15. Click on **Save** to save the customer Order.

For a detailed handling of this topic refer to Orders - Add Sales Order



16. The **Sales Orders for Customer** listing screen will be updated with the new Order that you have created.

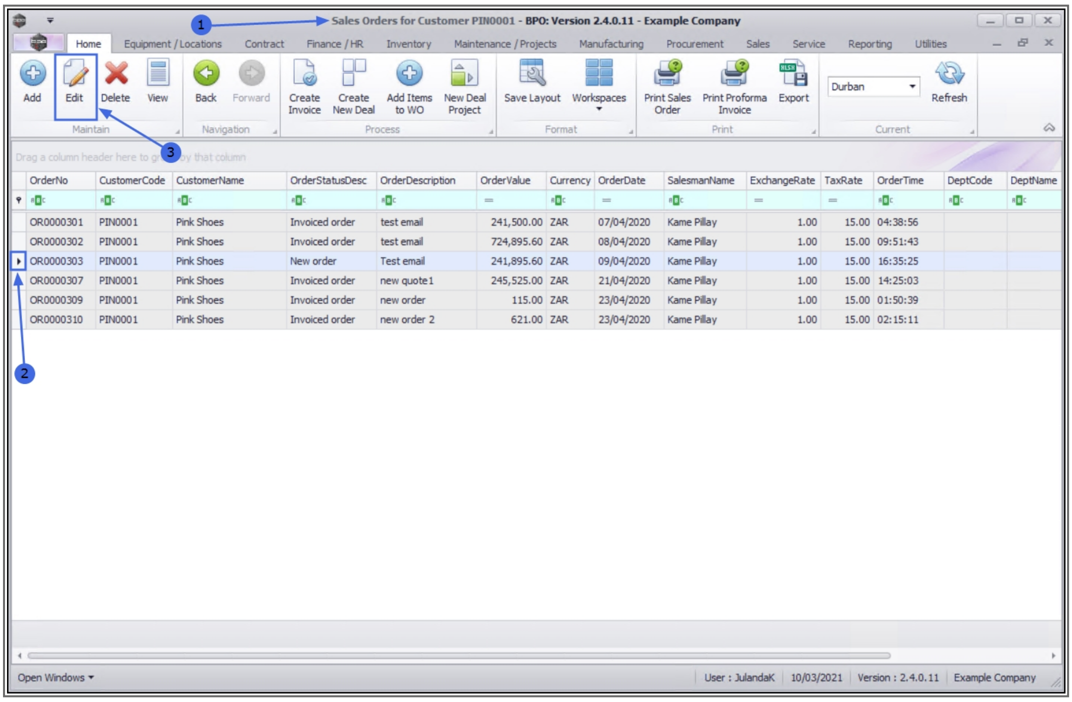


EDIT SALES ORDER

Sales Orders that have already been invoiced will not be available for editing.

1. From the **Sales Orders for Customer [**Customer Code**]** listing screen,
2. Click in the **row** of the Sales Order that you wish to edit.
3. Click on **Edit**.

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

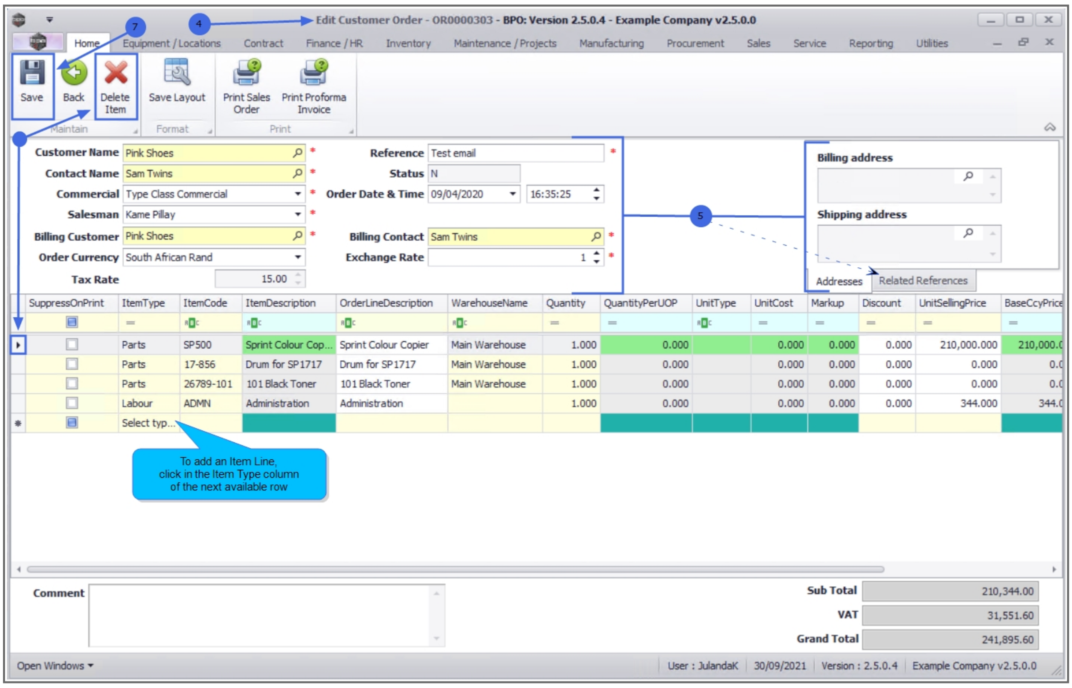


4. The **Edit Customer Order - OR[**Order Number**]** listing screen will display.
5. Make the required changes to the **Heading Information**, **Addresses** or **Related References tabs**.
6. Make the necessary changes to the Order Item frame:
   - To "Add Sales Order Items" on page 11, click in the Item Type column of the next available row.

- To "Delete Item line entry" on page 6, click on the **row** of the item you wish to remove, then click on **Delete Item**.

7. Click on **Save** to save the changes to the Customer Order and return to the **Sales Orders for Customer** screen.

For a detailed handling of this topic refer to Orders - Edit Sales Order



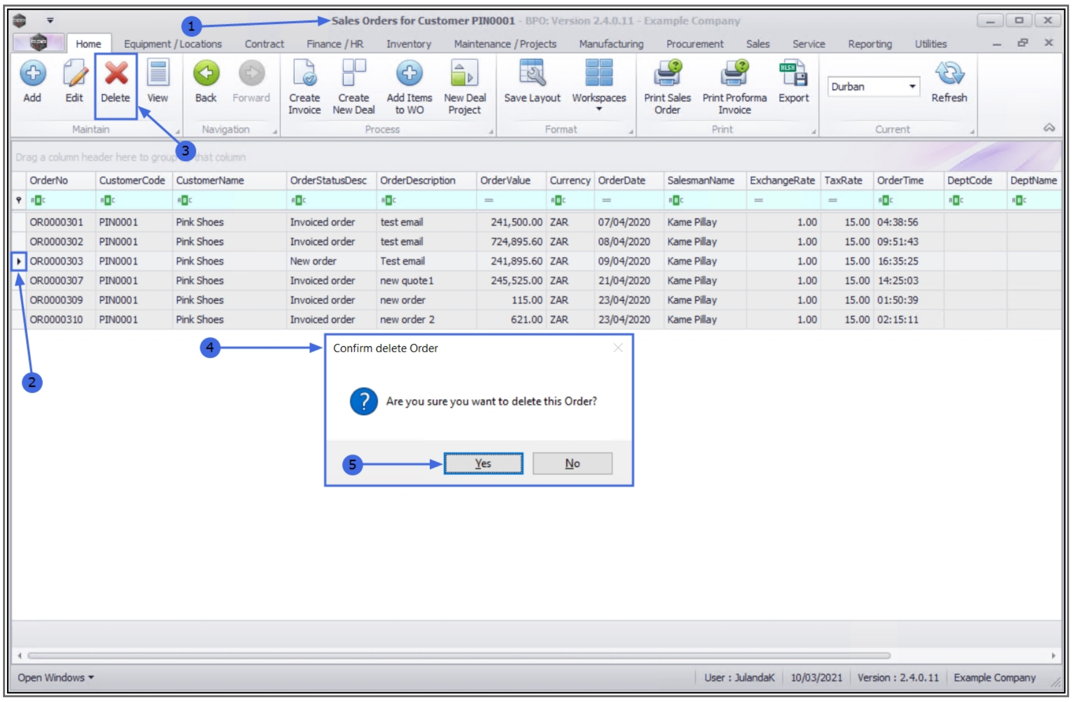
DELETE SALES ORDER

Orders that have already been invoiced will not be available for deletion.

1. From the **Sales Orders for Customer:** [Customer Code] listing screen,
2. Click on to the **row** of the Sales Quote that you wish to **remove**.
3. Click on **Delete**.

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

4. The **Confirm delete Order** message prompt will display;
    - **Are you sure you want to delete this Order?**
5. If you are sure that this is the correct order that needs to be removed, then click on **Yes** to proceed.



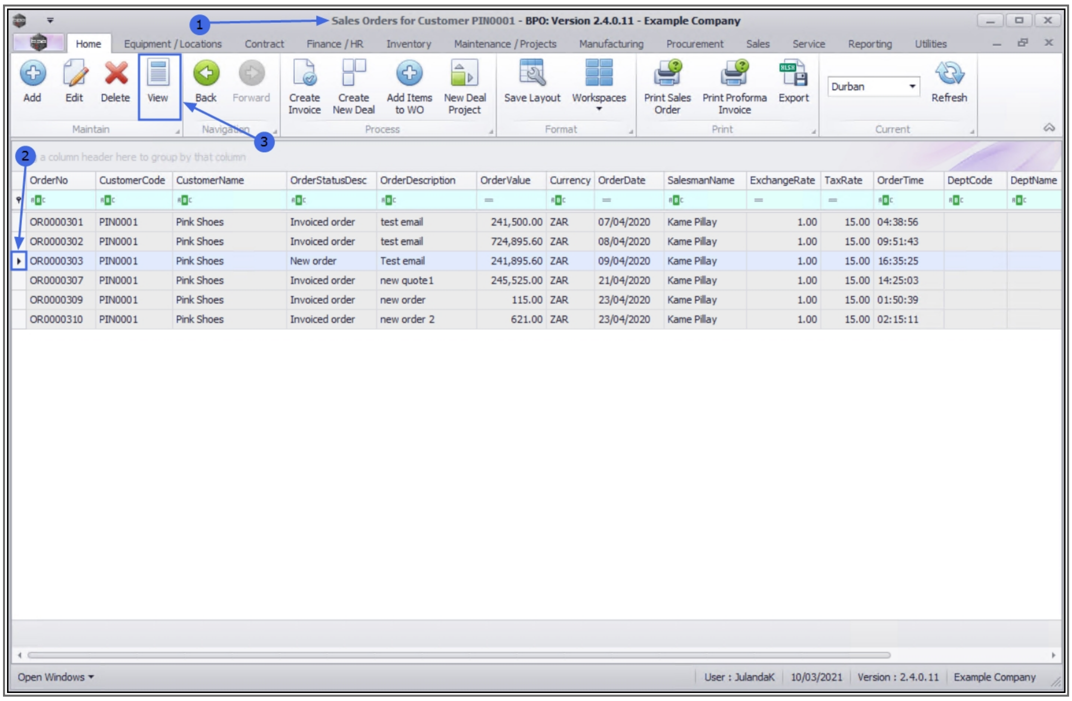
The Sales Order will be **removed** from the **Sales Orders for Customer** listing screen.

For a detailed handling of this topic refer to Orders - Delete Sales Order

VIEW CUSTOMER ORDER

An Order can be **viewed** in any status.

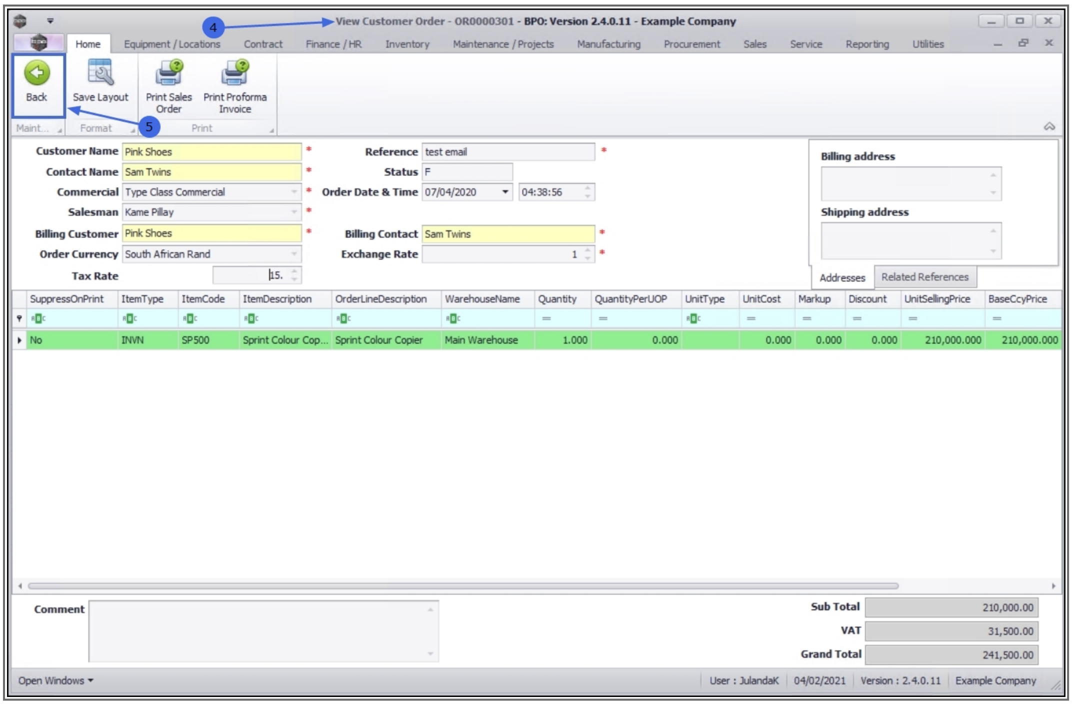
1. From the **Sales Orders for Customer:** **[**Customer Code**]** listing screen
2. Click on the **row** of the Sales Order that you wish to **view**.
3. Click on **View**.



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

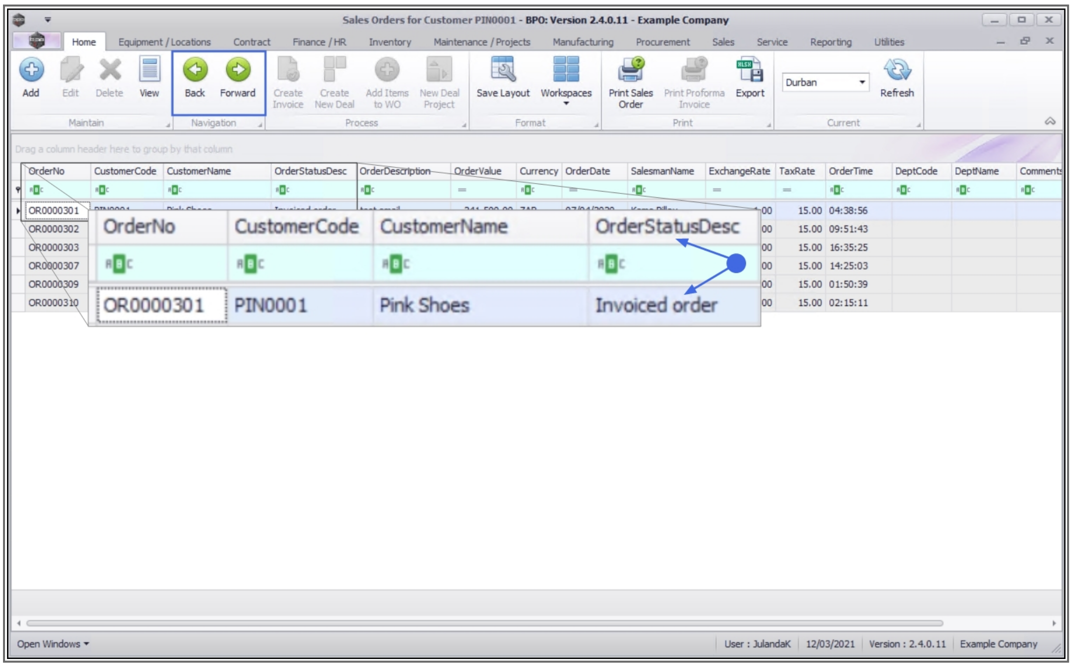
> No changes can be made to the information on the Order as this is a view only screen.

5. Click **Back** to return to the **Sales Orders for Customer** listing screen.



ORDER NAVIGATION BUTTONS

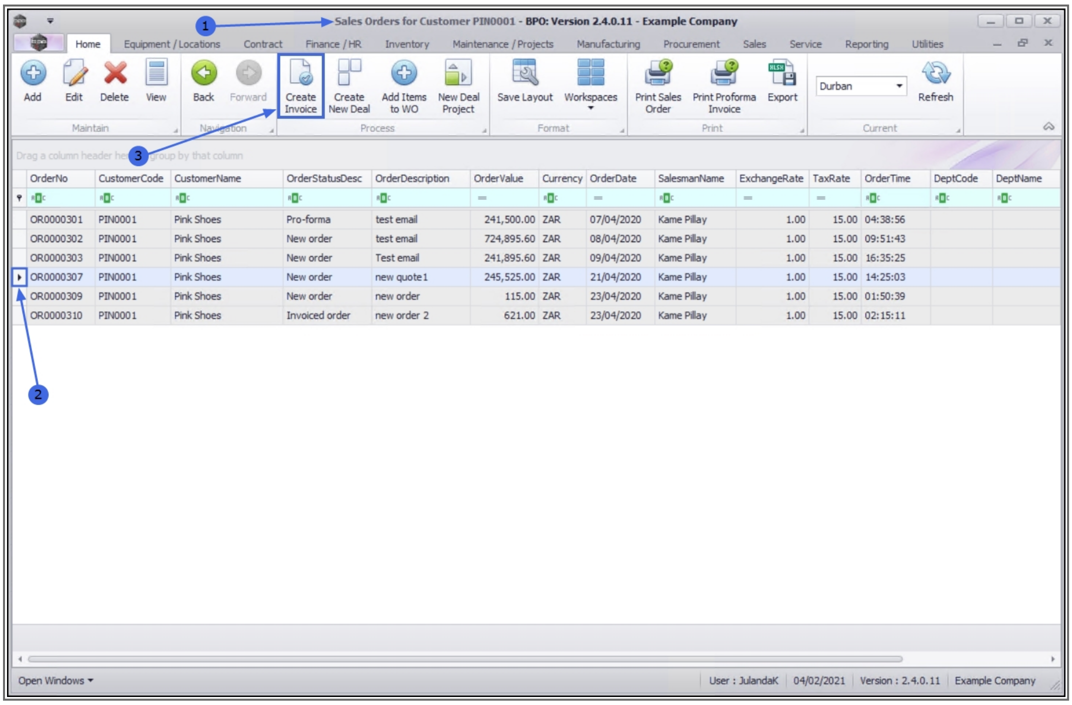
- The **Forward** navigation button, is only available in the '**[I] - Invoiced**' Order Status. This allows for quick navigation to the related documentation by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The **Back** navigation button will transport you back to the **Customer Listing** screen.



CREATE INVOICE

1. From the **Sales Orders for Customer [**Customer Code**]** screen,
2. Select the **row** of the Sales Order you wish to **create an invoice** for.
3. Click on **Create Invoice**.

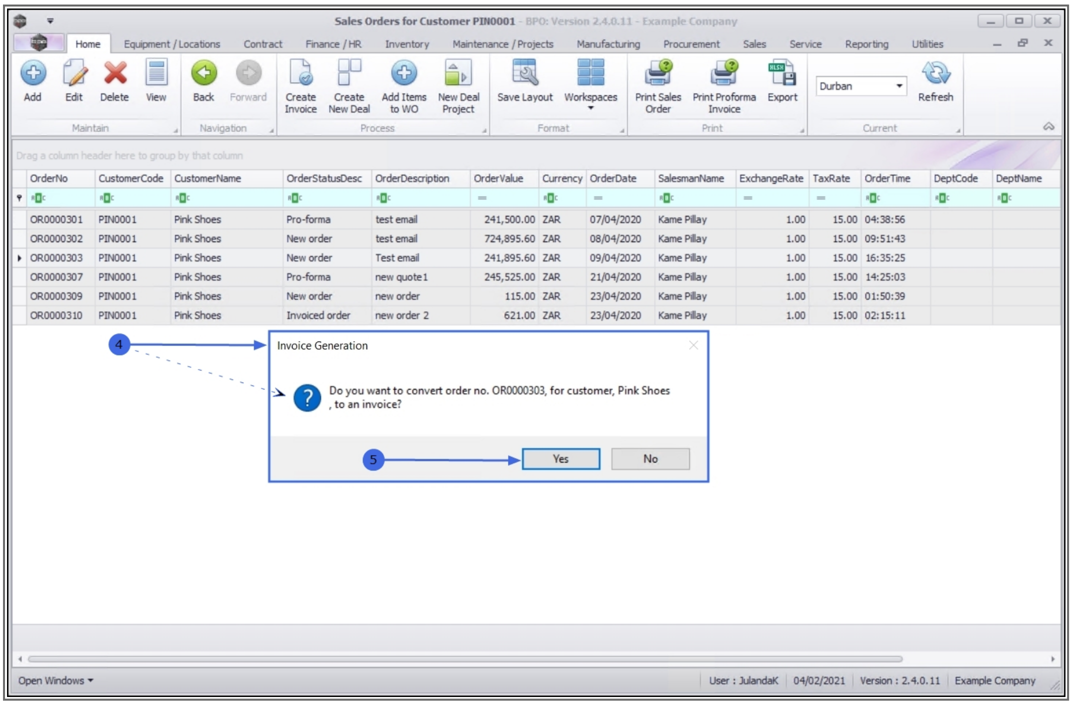
> **Short cut key: Right click** to display the **All groups** menu list. Click on **Invoice**.



You will receive three (**3**) **Invoice Generation** prompt messages:

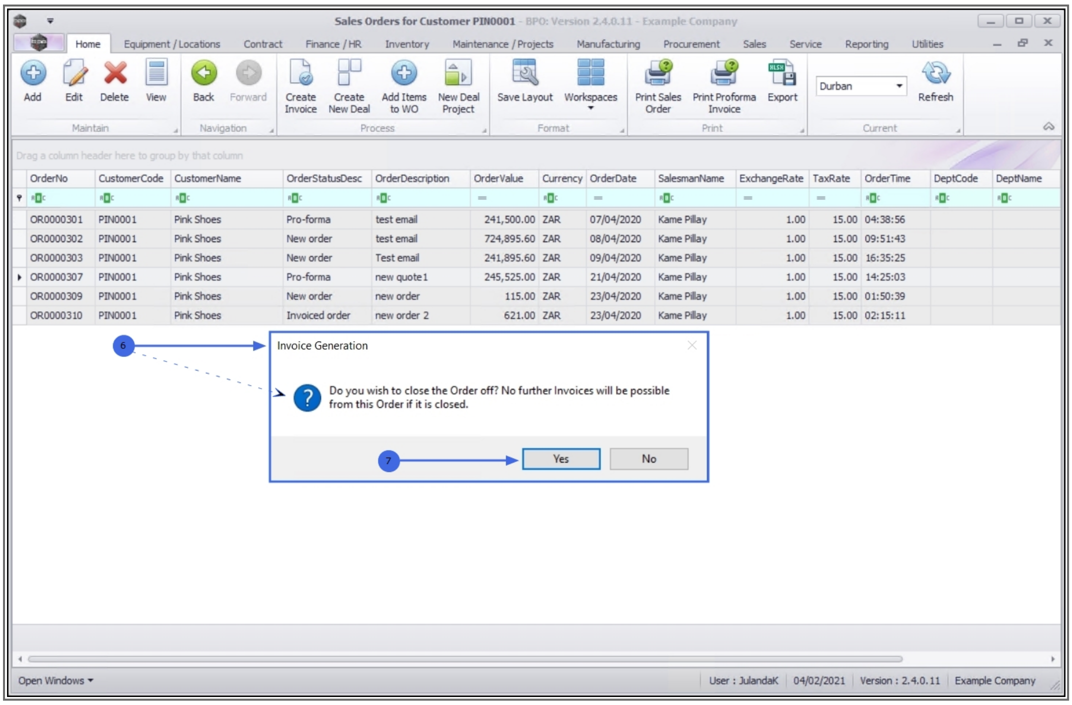
FIRST INVOICE GENERATION MESSAGE

4. The first **Invoice Generation** message will prompt you;
    - **Do you want to convert order no. [**order number**], for customer, [**customer code**], to an invoice?**
5. Click on **Yes**, if you are certain about your selection.



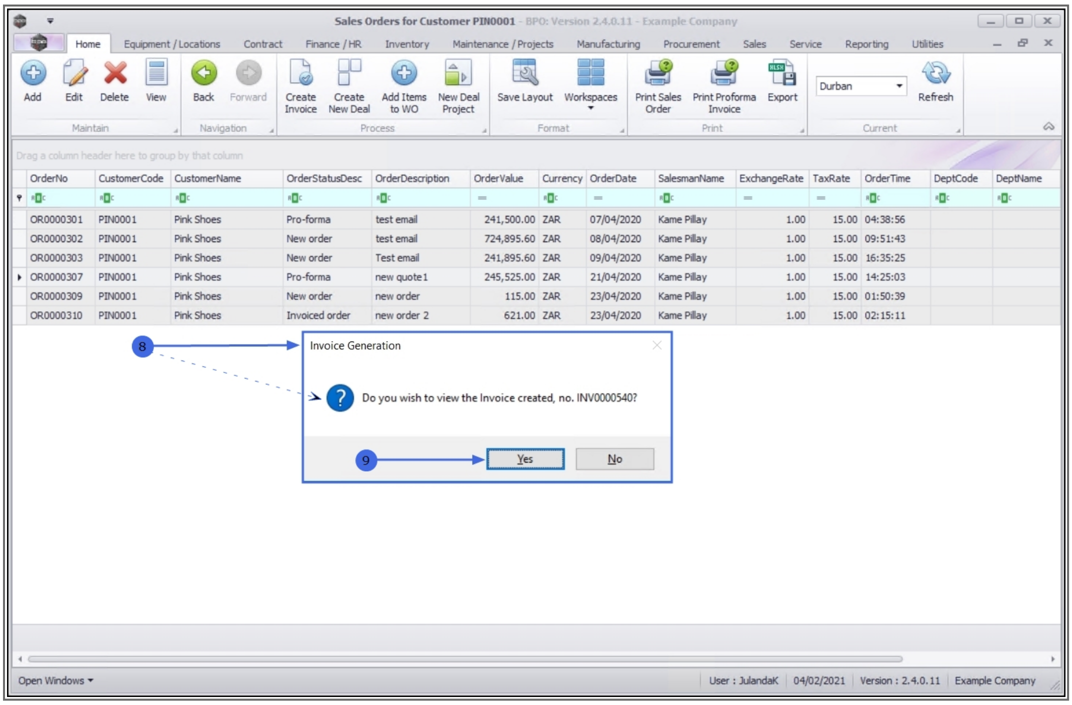
SECOND INVOICE GENERATION MESSAGE

6. The second **Invoice Generation** message will prompt you;
    - **Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.**
7. Click on **Yes**, if you are certain about your selection.



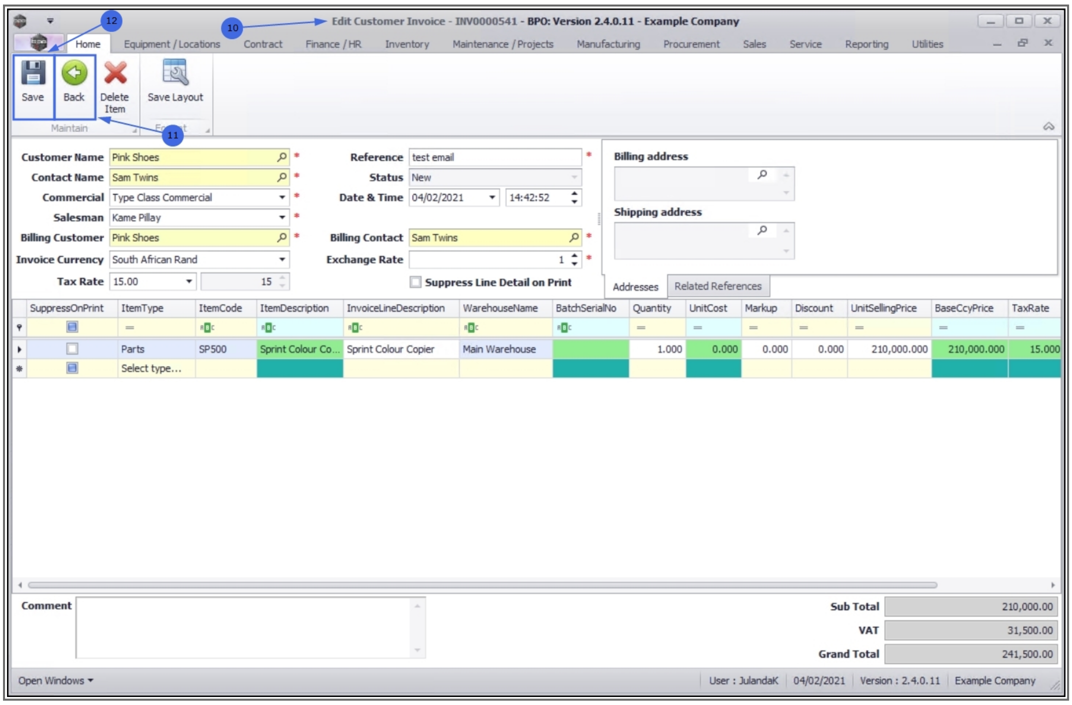
THIRD INVOICE GENERATION MESSAGE

8. When you receive the third **Invoice Generation** message requesting;
   - **Do you wish to view the Invoice created, no [**invoice number**]?**
9. Click on **Yes** to view the Invoice.
   - Click on **No** to return to the **Sales Orders for Customer** screen.



10. The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.
11. Click on **Back** to return to the **Sales Orders for Customer** screen, or
12. Click on **Save** if you have made changes to the Invoice.

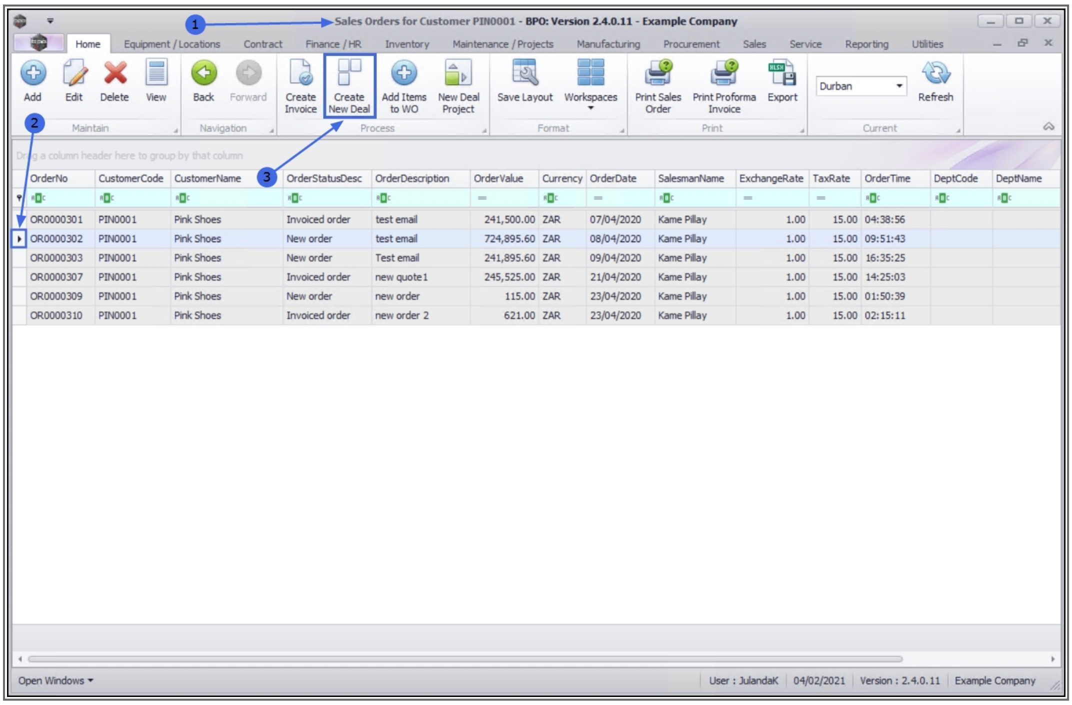
For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



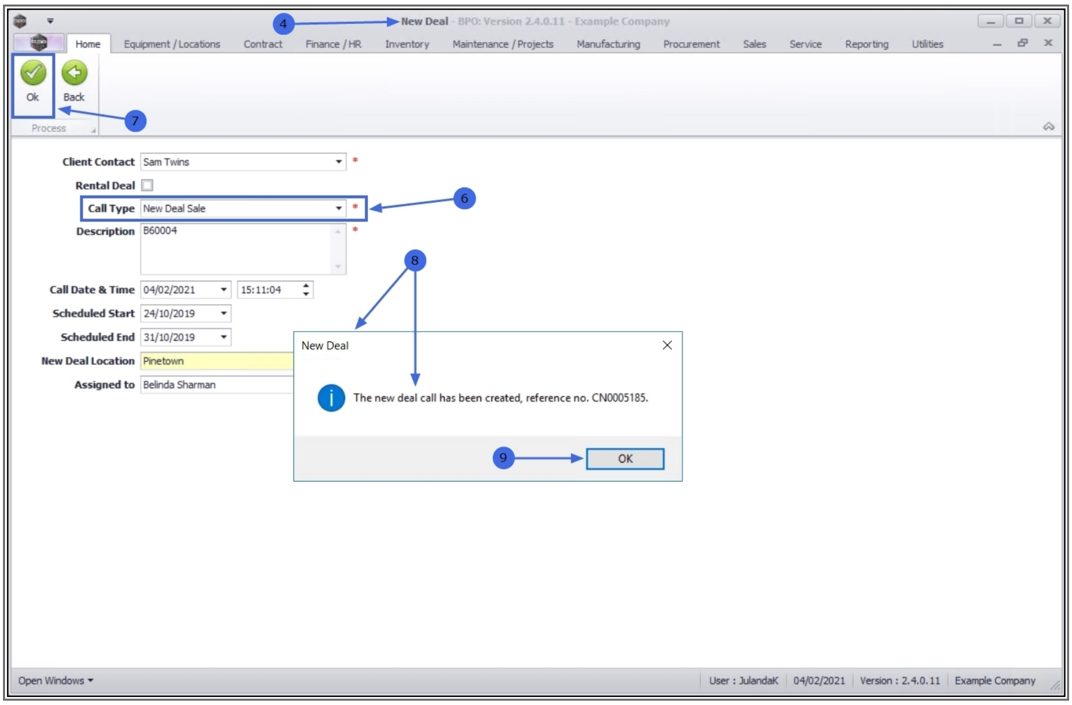
CREATE NEW DEAL

1. From the **Sales Orders for Customer [**Customer Code**]** screen,
2. Select the **row** of the Order you wish to create a New Deal for.
3. Click on **Create New Deal**.

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



4. "The New Deal screen will be displayed." on page 3
5. Complete the New Deal information as required.
6. The **Call Type** field enables you to distinguish if this order is a New Deal Sale or New Deal Rental.
7. When you have completed the new deal information, click on **OK**.
8. When you receive the **New Deal** message to confirm that;
    - **The new deal call has been created, reference no. [**reference number**]**
9. Click on **OK**.



10. You will return to the **Sales Orders** screen.
11. The **OrderStatusDesc** will have updated to **Invoiced order**.

For a detailed handling of this topic refer to Orders - Convert to New Deal Sale / Rental

ADD ITEMS TO WORK ORDER

The Add Items to WO function is only valid where the Customer Order has been linked to an existing Work Order.

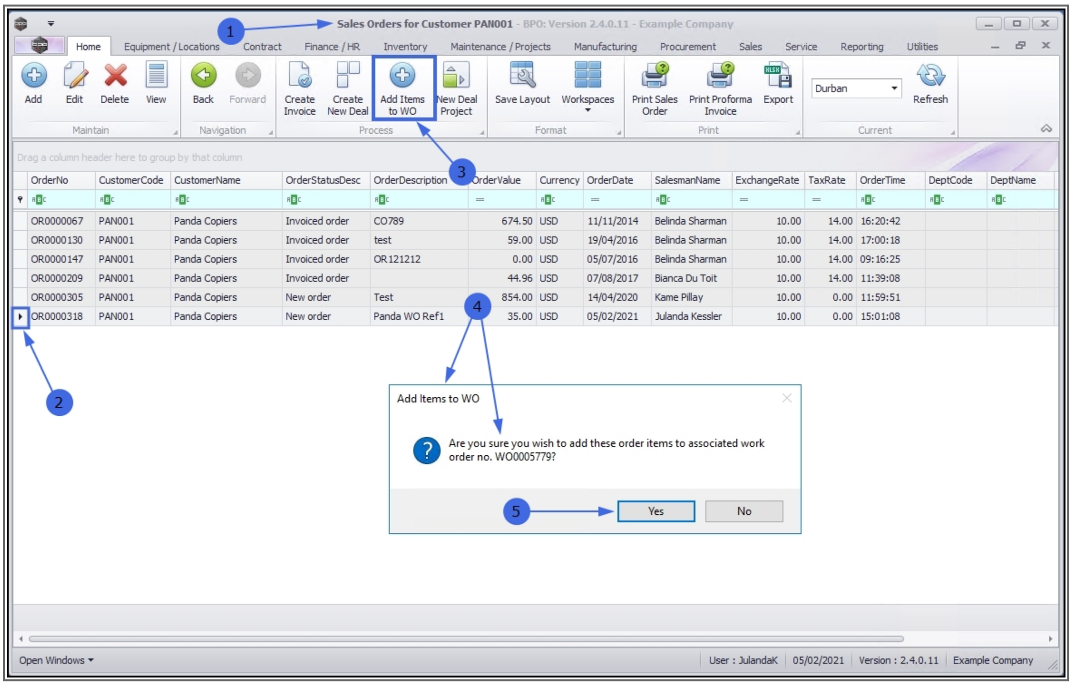
1. From the **Sales Orders for Customer [**Customer Code**]** screen,
2. Select the **row** of the Sales Order you wish to add items to.
3. Click on **Add Items to WO**.

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

4. When you receive the **Add Items to WO** message to confirm;

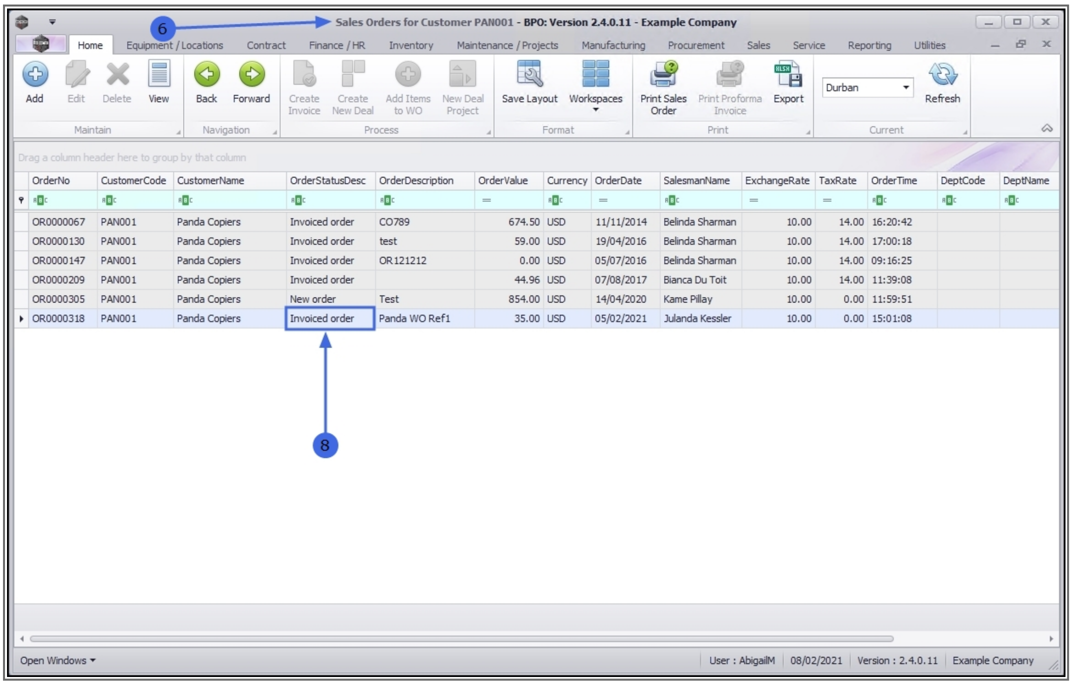
- **Are you sure you wish to add these order items to associated work order no [ ]?**

5. If you are certain about your selection, click on **Yes**.



6. You will return to the **Sales Orders for Customer** listing screen.
7. The Work Order items will have been added to the Sales Order.
8. The OrderStatusDesc field for the Order, will have changed from New Order to **Invoiced order**.

For a detailed handling of this topic refer to Orders - Add Items to Work Order



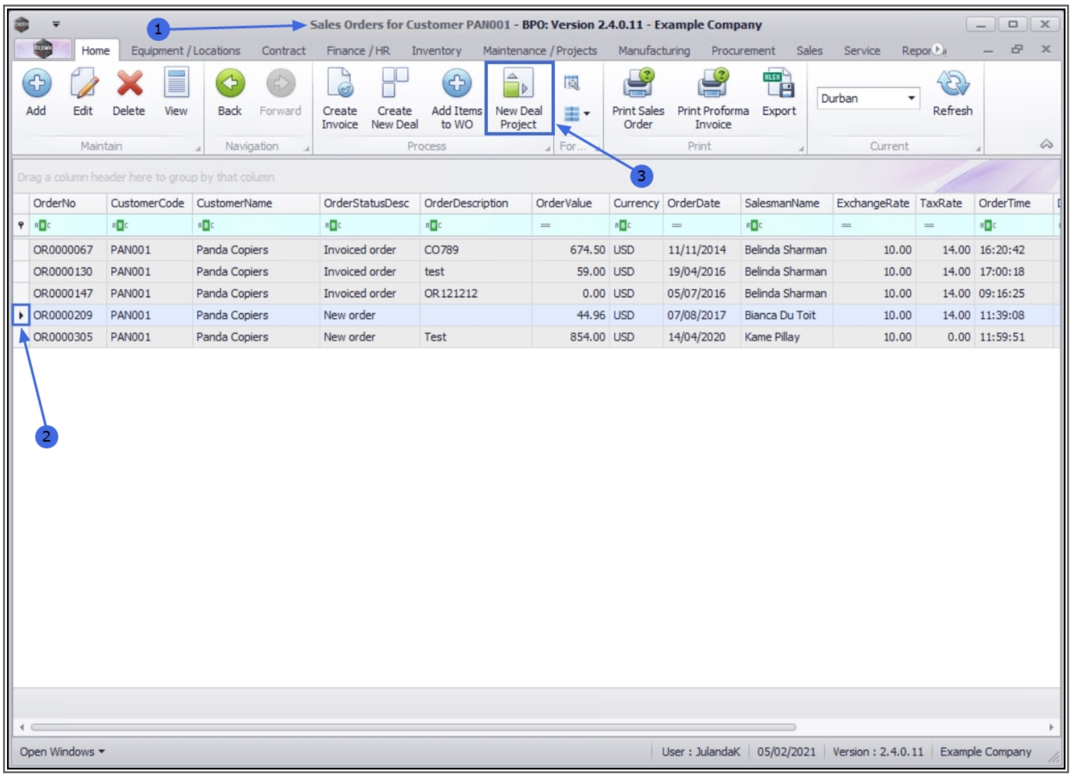
NEW DEAL PROJECT

- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

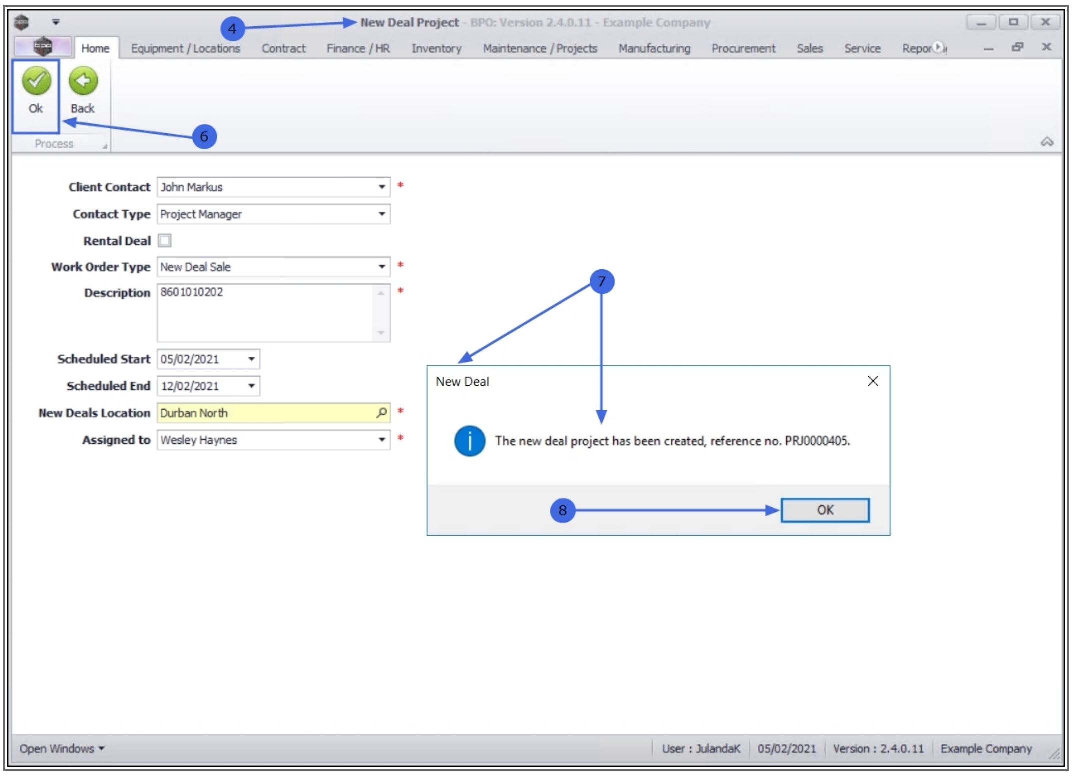
1. From the **Sales Orders for Customer [**Customer Code**]** screen,
2. Click on the **row** of the **Sales Order** you wish to convert to a New Deal Project.

3. Click on **New Deal Project**.

> **Short cut key: Right click** to display the **All groups** menu list. Click on **New Deal Project**.



4. "The New Deal Project screen will be displayed." on page 3
5. Complete the New Deal Project Details as required,
6. Click on **OK** to save the new deal details.
7. When you receive the **New Deal** message to confirm that;
    - **The new deal project has been created, reference no. [**reference number**]**
8. Click on **OK**.



9. You will return to the **Sales Order** screen.
10. The **OrderStatusDesc** will have updated to **Invoiced order**.

For a detailed handling of this topic refer to Orders - Convert to New Deal Project

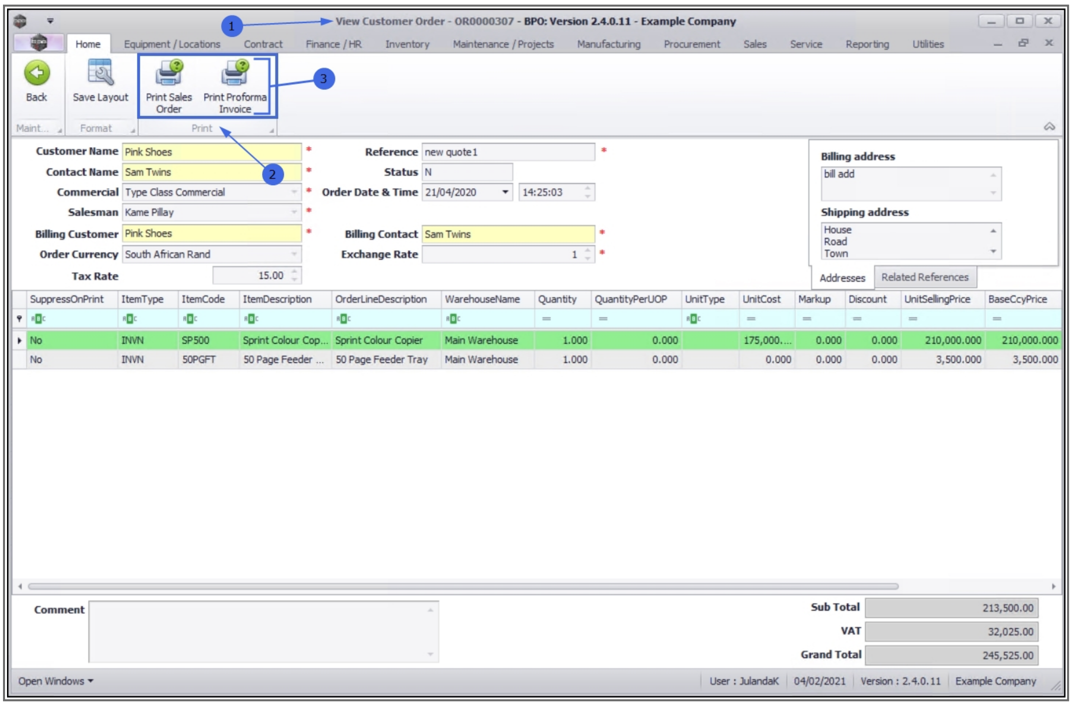
PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to **Print a Sales Order** and / or **Print a Proforma Invoice** from the;

- Sales Orders listing screen
- Add Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the proforma invoice will be printed from the **View Customer Order - OR[***Order Number***]** screen. The same procedure can be followed from any of the above mentioned screens.

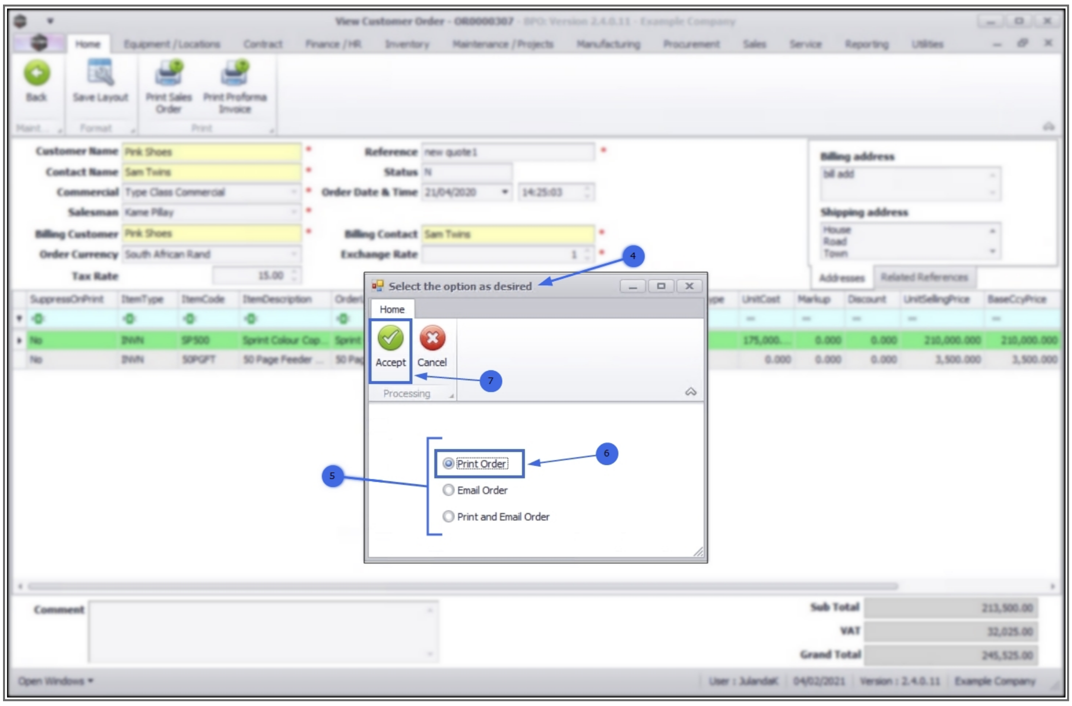
1. From the **View Customer Order - OR[**Order Number**]** screen,
2. Click the print option that you require.
    - Print Sales Order
    - Print Proforma Invoice
3. The example has **Print Proforma Invoice** selected.



4. The **Select the option as desired** message will display, prompting for your response.
5. Click on the **radio button** to select to either **Print Order**, **Email Order** or **Print and Email Order**.

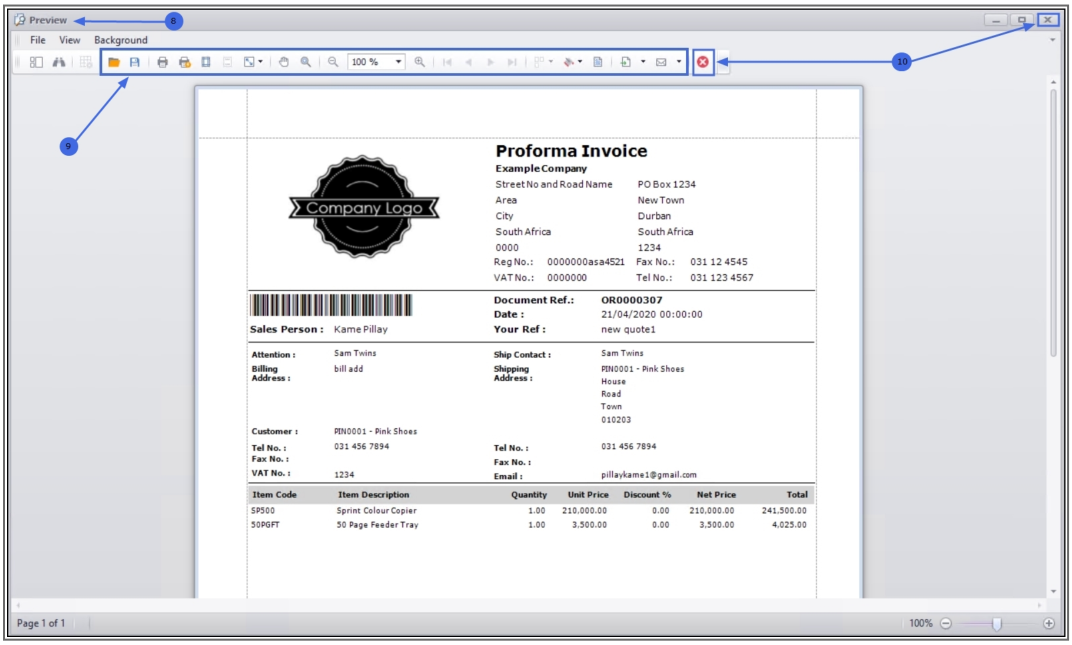
When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server and not from MS Outlook.

6. The example has **Print Order** selected.
7. Click on **Accept** to proceed.



8. The Sales Order and/or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
9. You can make cosmetic changes to the document, as well as **Save**, **Print**, **Export**, **Add a Watermark** or **Email** the Sales Order or Proforma Invoice.
10. Click on **Close** to return to the **Sales Quotes for Customer** screen.

For a detailed handling of this topic refer to Orders - Print Sales Order or Orders - Print Proforma Invoice


Preview
File View Background
100 %
Proforma Invoice
Example Company
Street No and Road Name
PO Box 1234
Area
New Town
City
Durban
South Africa
South Africa
0000
1234
Reg No.: 0000000asa4521
Fax No.: 031 12 4545
VAT No.: 0000000
Tel No.: 031 123 4567
Company Logo
Document Ref.: OR0000307
Date : 21/04/2020 00:00:00
Sales Person : Kame Pillay
Your Ref : new quote1
Attention : Sam Twins
Billing Address : bill add
Ship Contact : Sam Twins
Shipping Address : PIN0001 - Pink Shoes
House
Road
Town
010203
Customer : PIN0001 - Pink Shoes
Tel No. : 031 456 7894
Fax No. :
VAT No. : 1234
Tel No. : 031 456 7894
Fax No. :
Email : pillaykame1@gmail.com
Item Code
Item Description
Quantity
Unit Price
Discount %
Net Price
Total
SP500
Sprint Colour Copier
1.00
210,000.00
0.00
210,000.00
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50 Page Feeder Tray
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Page 1 of 1
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