

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

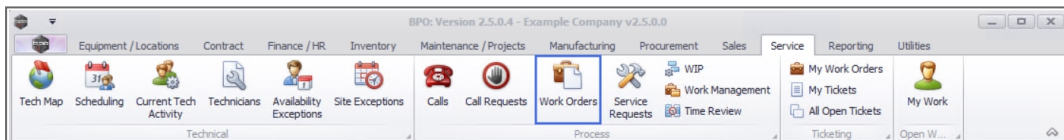
SERVICE

WORK ORDERS – SALES ORDERS

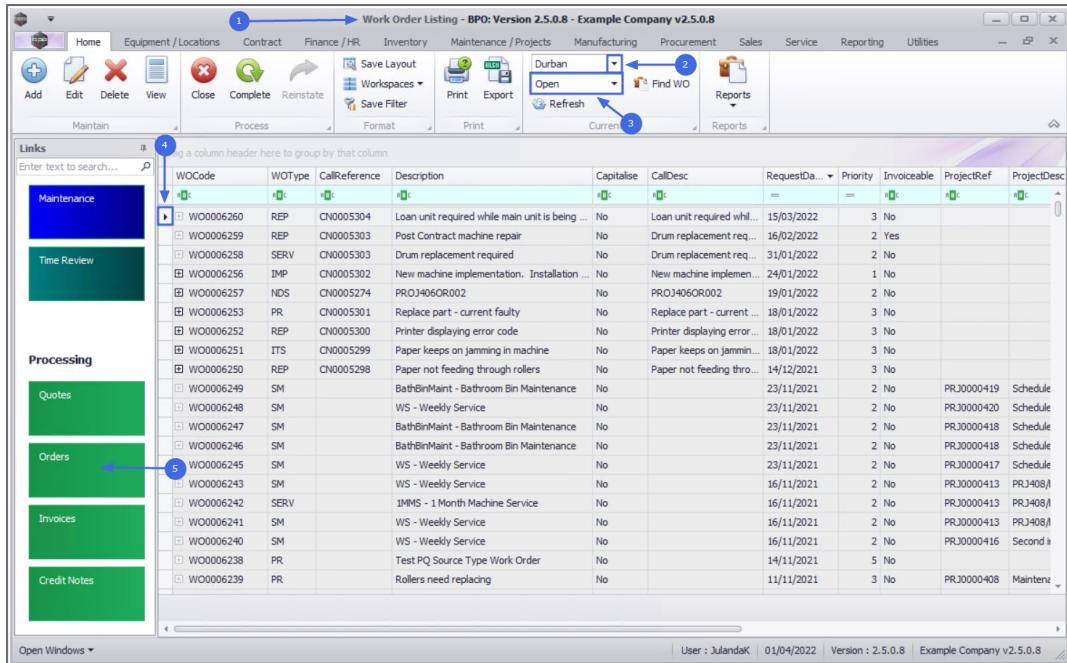
The **Orders** tile direct you to a list of Sales Orders for a selected Customer.

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: Service > Work Orders



1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.
3. Select the **Status**.
 - The example has **Open** selected.
4. Select the **row** of the **work order** you wish to convert to a sales order.
5. Click on the **Orders** tile.



6. The **Sales Orders for Work Order**[work order number] screen will be displayed.



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

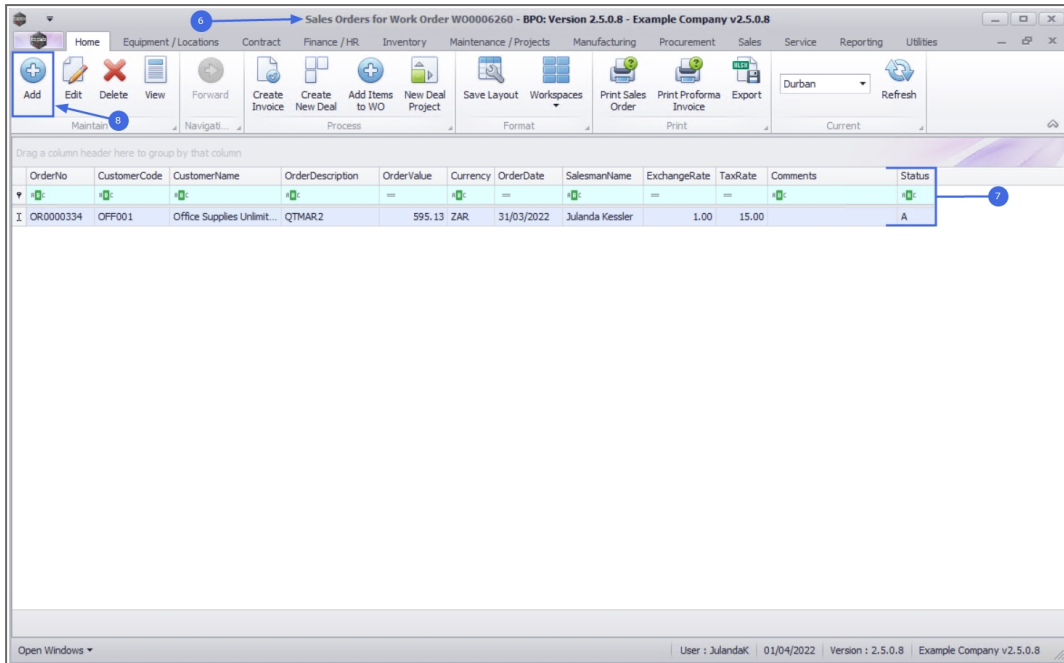
7. Any Sales Orders that have already been added to the work order will display in the data grid.

ADD SALES ORDER

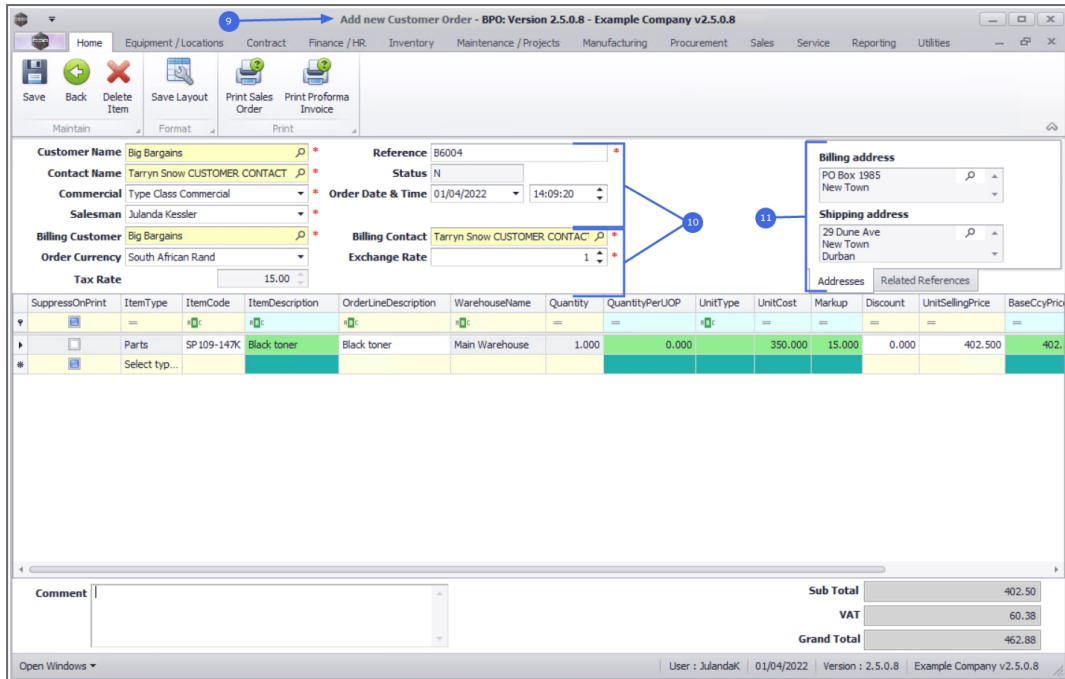
8. Click on **Add**.



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



9. "The Add new Customer Order screen will be displayed." on page 2
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.

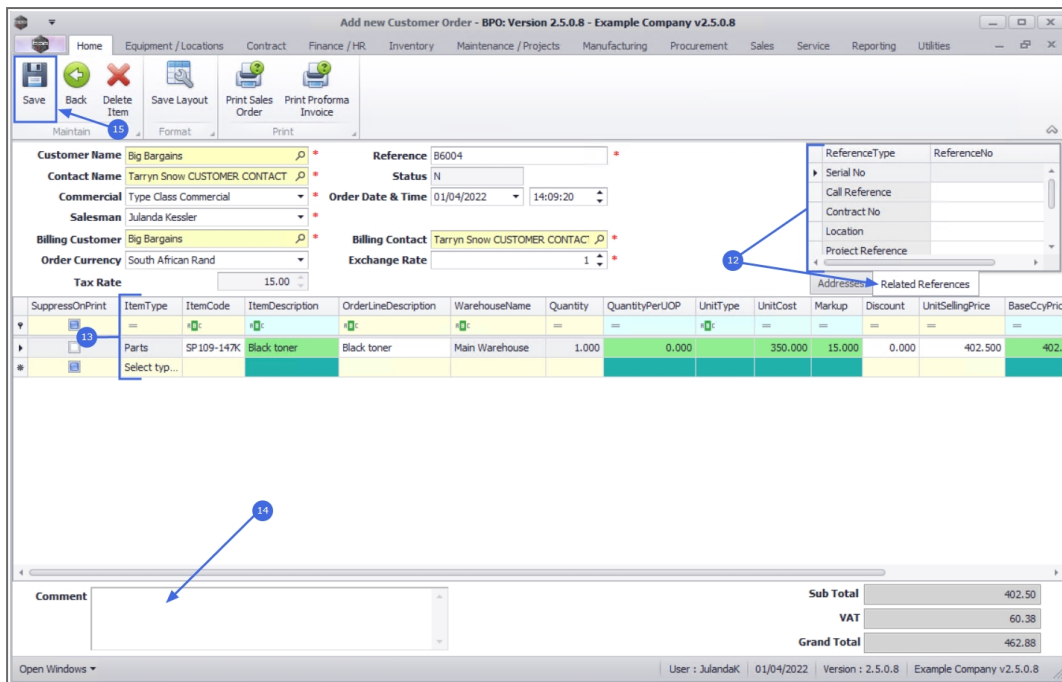


RELATED REFERENCES

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

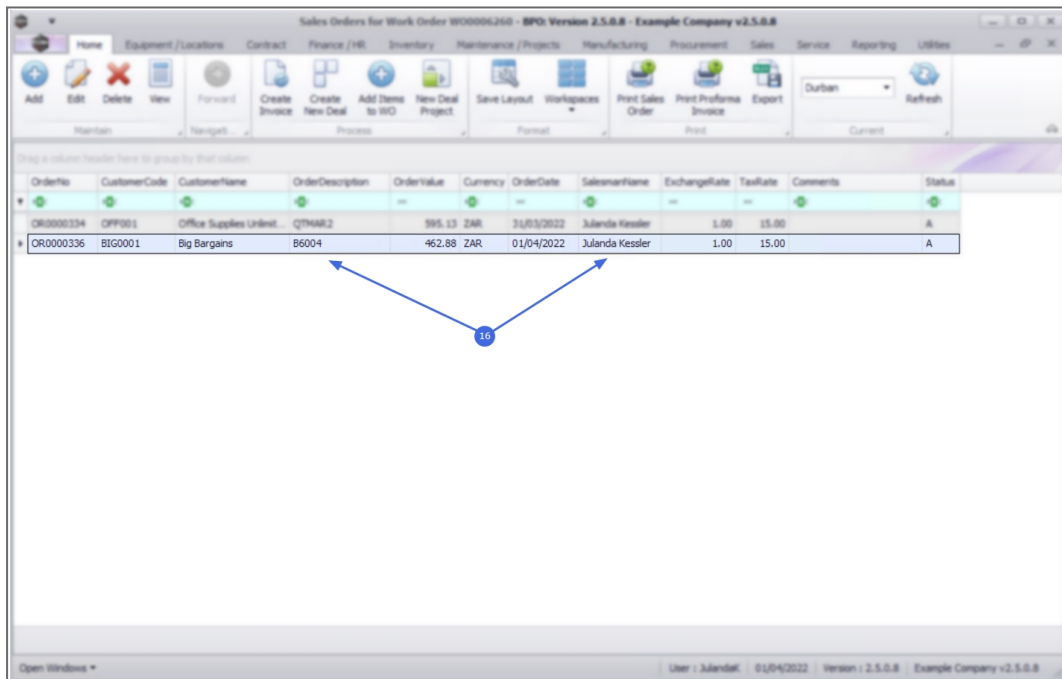
LINE ITEMS AND COMMENTS

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.



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

For a detailed handling of this topic refer to [Orders - Add Sales Order](#)



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] screen,
2. Click in the **row** of the Sales Order you wish to edit.
3. Click on **Edit**.



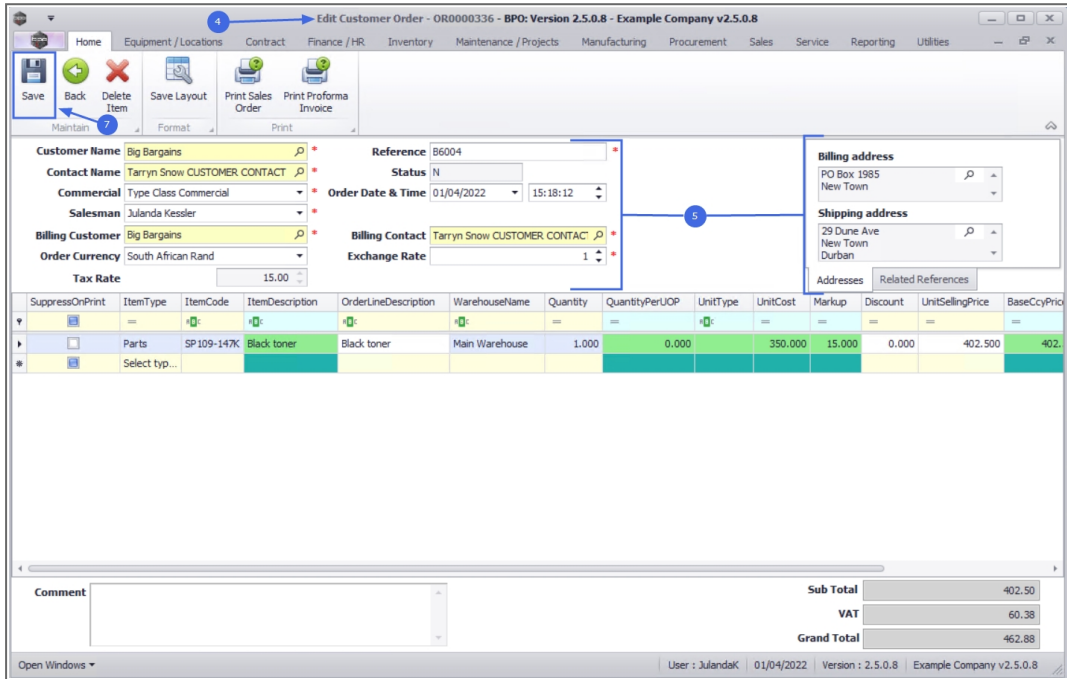
Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.

OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	Comments	Status
OR0000334	OFF001	Office Supplies Unlimit...	QTMAR2	595.13	ZAR	31/03/2022	Julanda Kessler	1.00	15.00		A
OR0000336	BIG0001	Big Bargains	B600+4	462.88	ZAR	01/04/2022	Julanda Kessler	1.00	15.00		A

4. The **Edit Customer Order** - [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



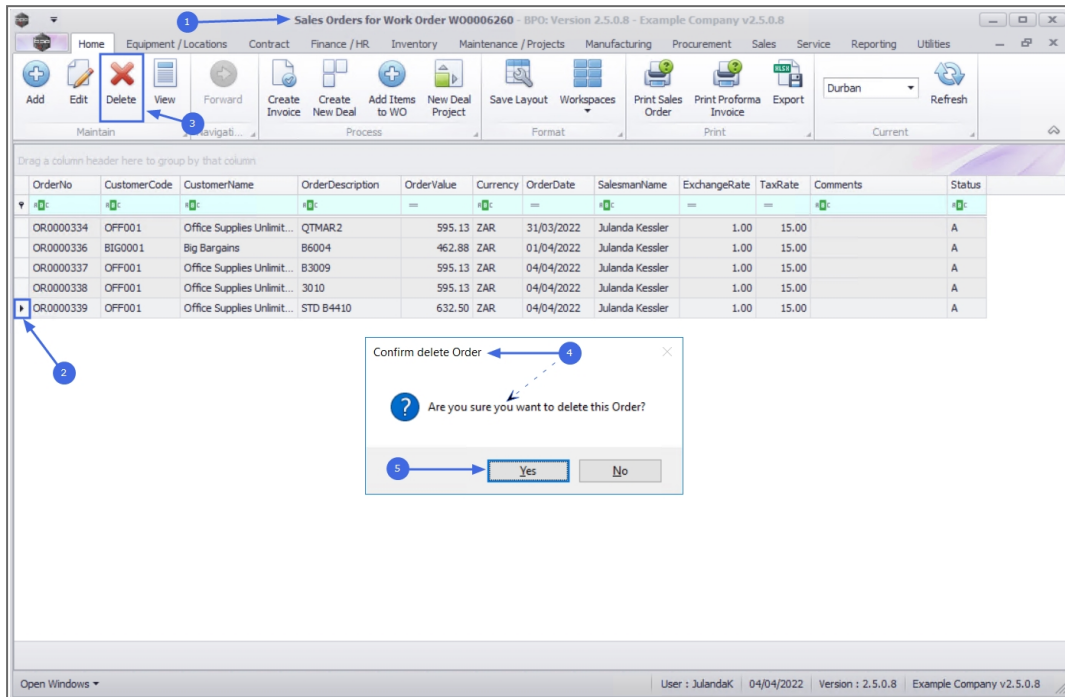
Orders that have already been invoiced will not be available for deletion.

- From the **Sales Orders for Work Order** [work order number] screen,
- Click on to the **row** of the Sales Order you wish to **remove**.
- Click on **Delete**.



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

4. The **Confirm delete Order** message will display;
 - **Are you sure you want to delete this Order?**
5. Click on **Yes**.



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](#)

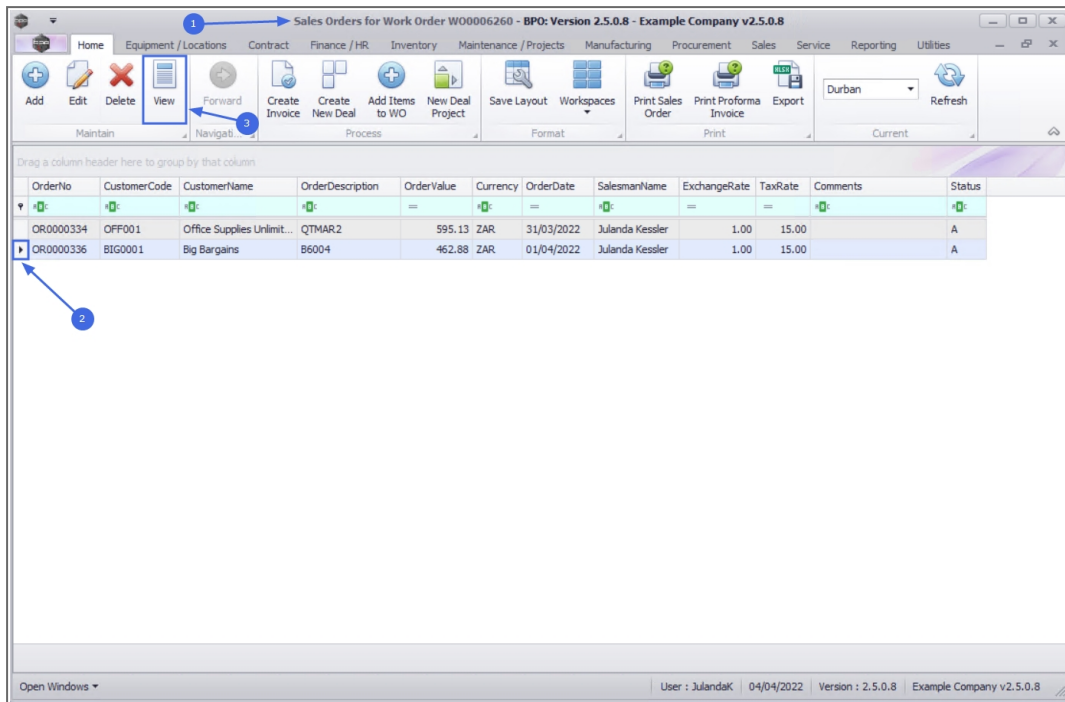
VIEW SALES ORDER

An Order can be viewed in any status.

1. From the **Sales Orders for Work Order** [work order number] screen,
2. Click on the **row** of the Sales Order that you wish to **view**.
3. Click on **View**.



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

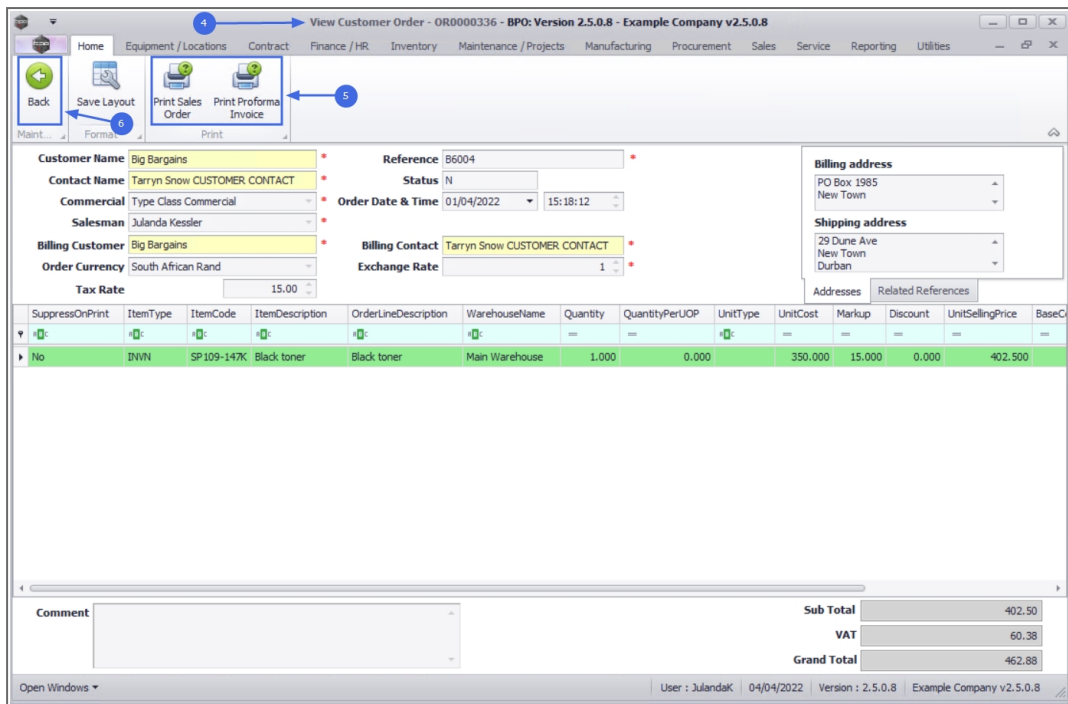


4. The **View Customer Order - [Order Number]** screen will display.



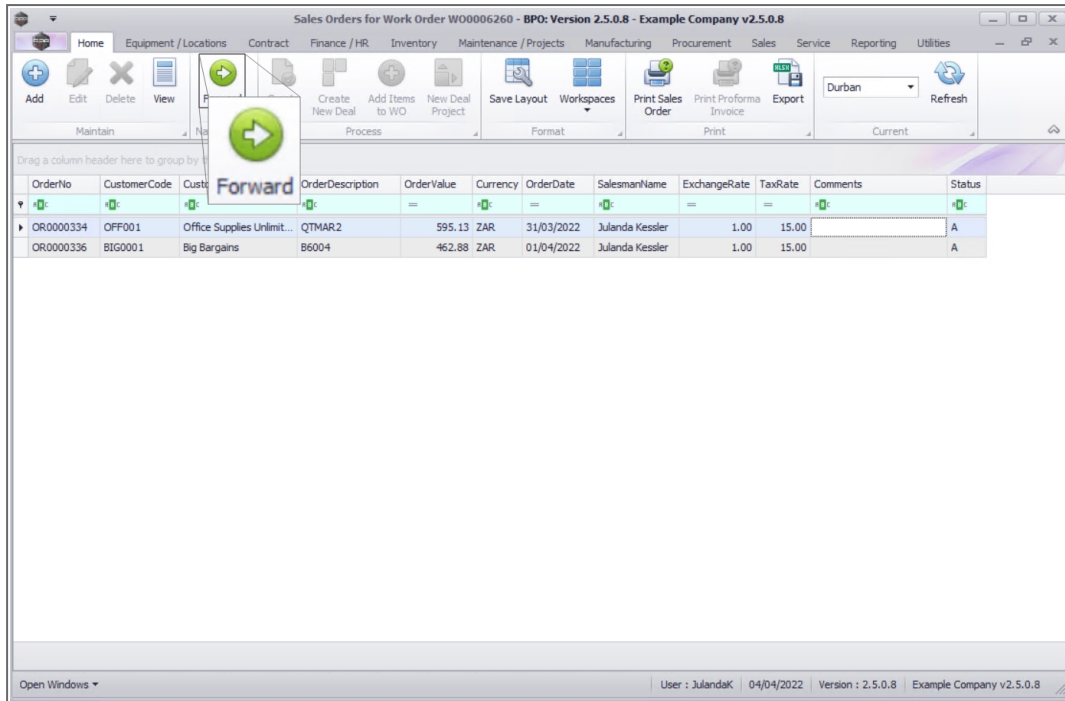
No changes can be made to the information on the Order as this is a view only screen.

- You can **"Print Sales Order / Print Proforma Invoice"** on page 21 from this screen.
- Click **Back** to return to the **Sales Orders for Work Order** screen.



NAVIGATION BUTTONS

- The **Forward** navigation button allows for quick navigation to 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 **Work Order Listing** screen.

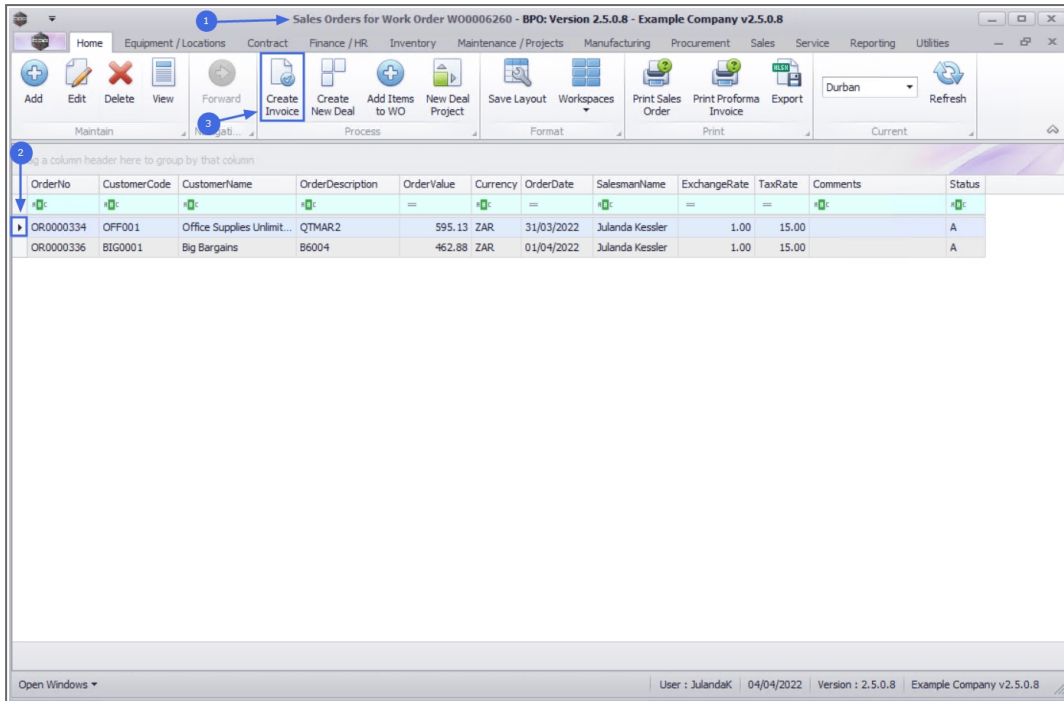


CREATE INVOICE

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

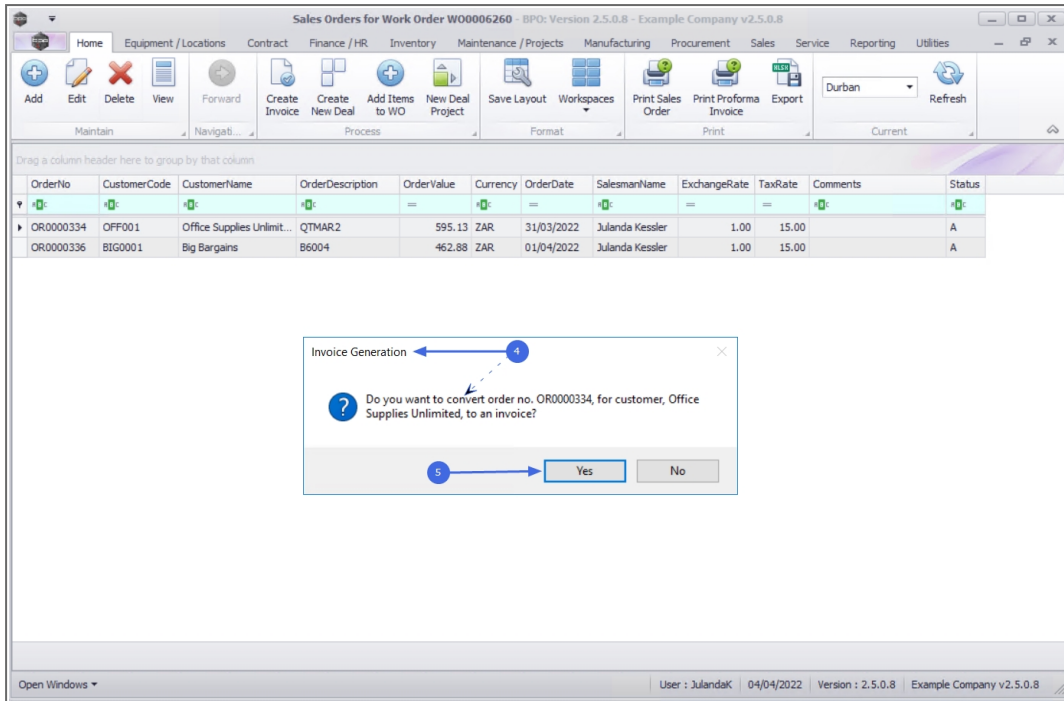


Short cut key: Right click to display the **All groups** menu list. Click on **Invoice**.

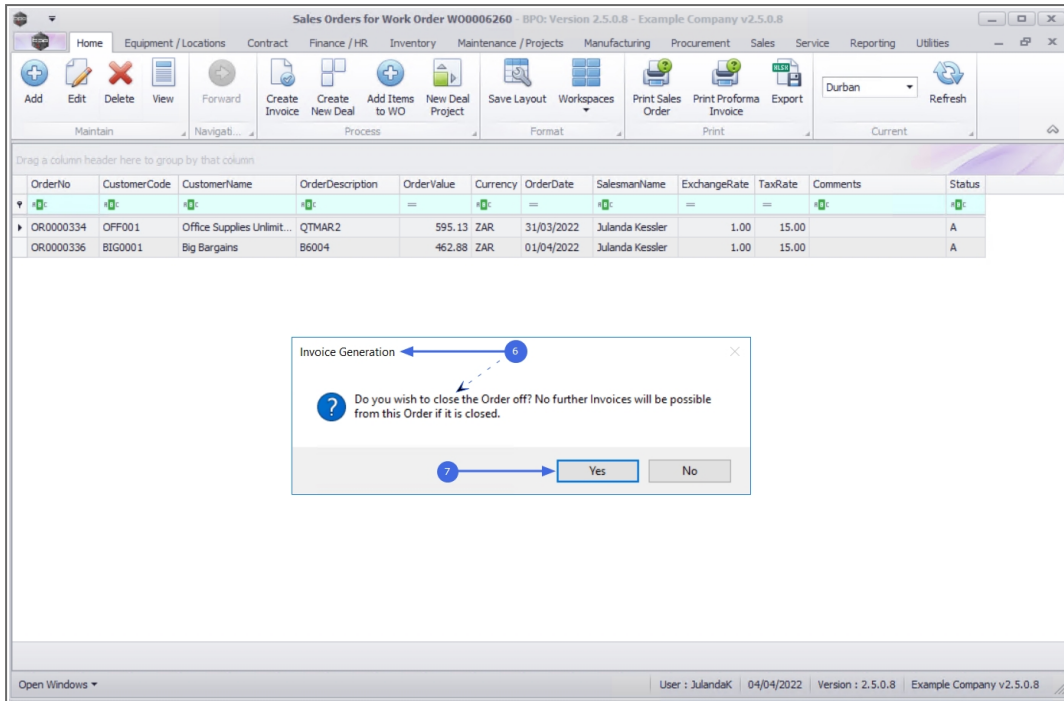


You will receive three (3) **Invoice Generation** messages:

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



6. The second **Invoice Generation** message will confirm;
 - **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**.



8. When you receive the third **Invoice Generation** message to confirm;
 - **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.

Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	Comments	Status
OR0000334	OFF001	Office Supplies Unlimit...	QTMAR2	595.13	ZAR	31/03/2022	Julanda Kessler	1.00	15.00		A
OR0000336	BIG0001	Big Bargains	B6004	462.88	ZAR	01/04/2022	Julanda Kessler	1.00	15.00		A

Invoice Generation

Do you wish to view the Invoice created, no. INV0000572?

Yes No

User : JulandaK | 04/04/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

10. The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.

11. After making the necessary changes, click on **Save**.



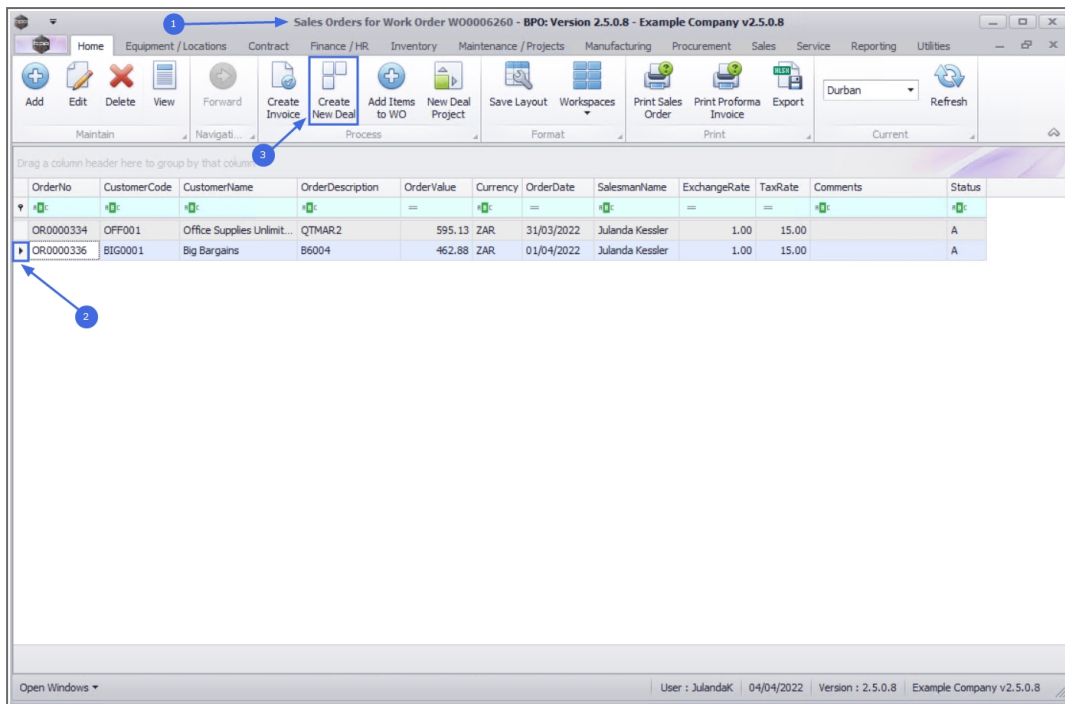
For a detailed handling of this topic refer to [Orders - Convert to Sales Invoice](#)

CREATE NEW DEAL

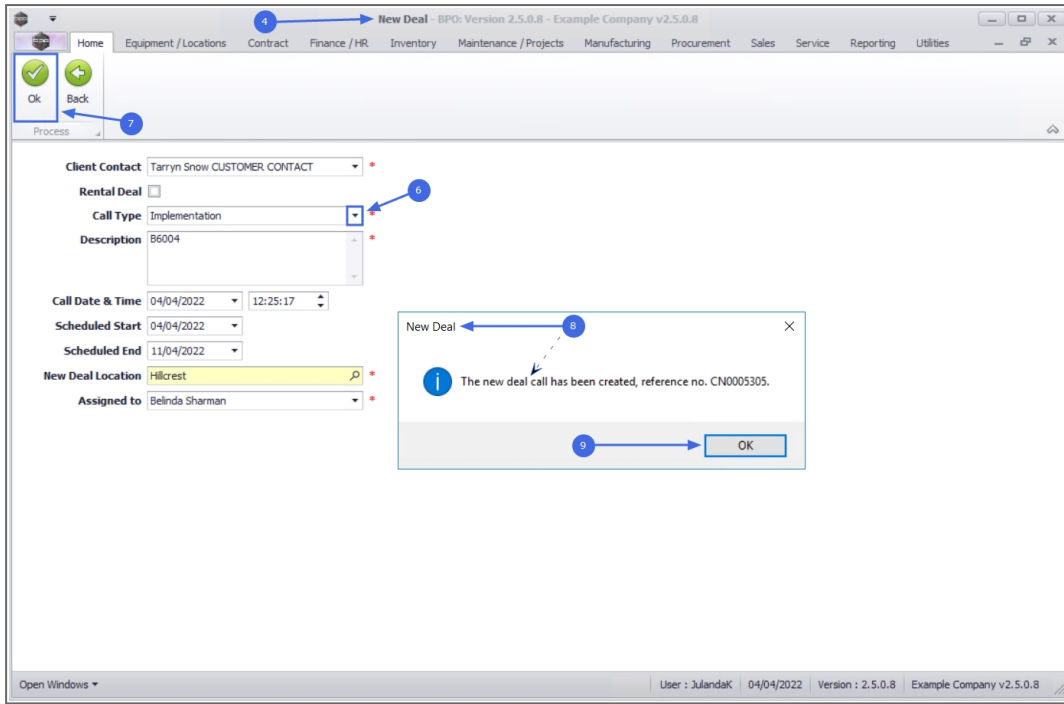
1. From the **Sales Orders for Work Order** [work order number] screen,
2. Select the **row** of the Sales Order you wish to create a New Deal for.
3. Click on **Create New Deal**.



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.



For a detailed handling of this topic refer to [Orders - Convert to New Deal Sale / Rental](#)

ADD ITEMS TO WORK ORDER

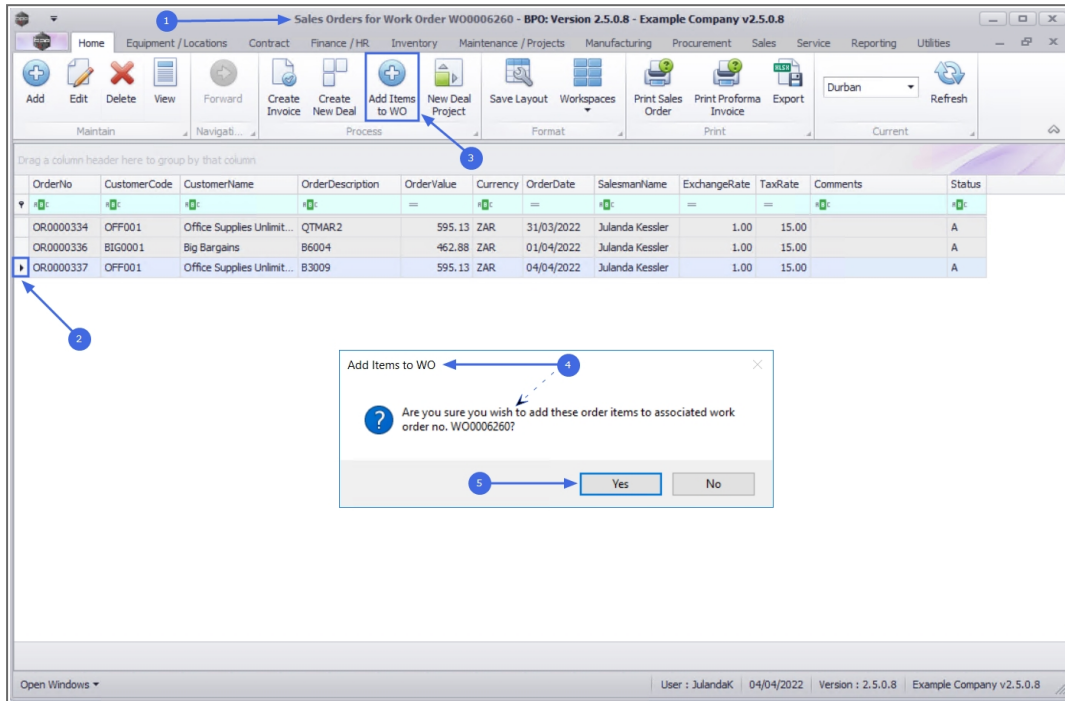
The Add Items to WO function is only valid where the Customer Order has been linked to an existing Work Order.

1. From the **Sales Orders for Work Order [work order number]** 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 [work order number]?**
5. Click on **Yes**.



6. You will return to the **Sales Orders for Work Order** screen.
7. The Work Order items will have been added to the Sales 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.

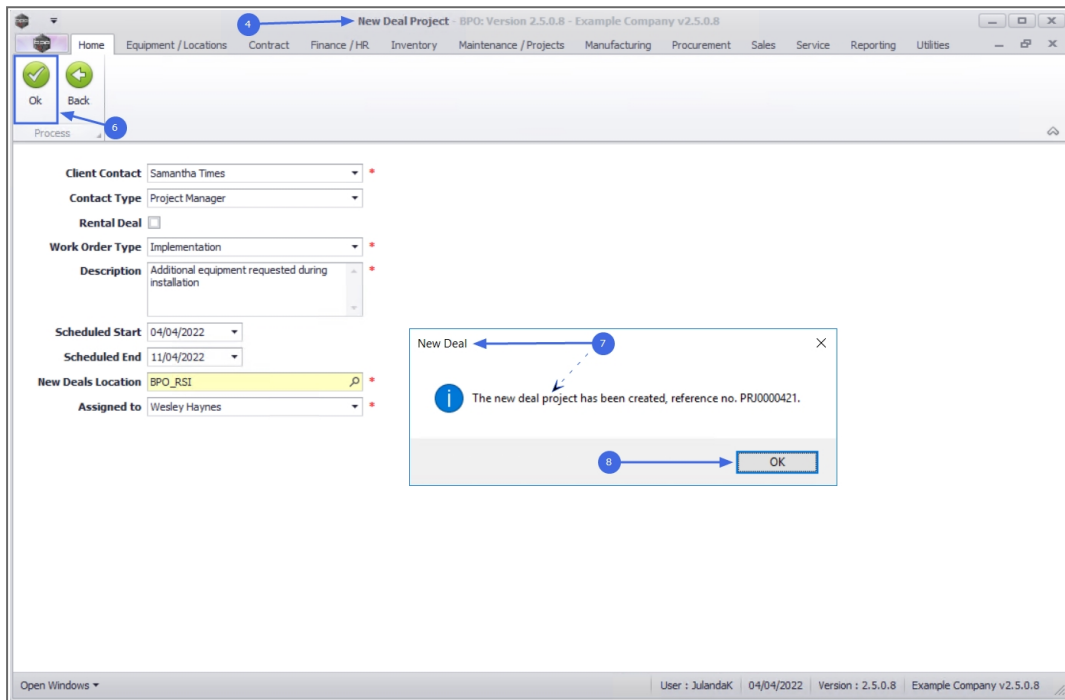
1. From the **Sales Orders for Customer [Customer Code]** screen,
2. Click on the **row** of the **Sales Order** you wish to convert to a New Deal Project.
3. Click on **New Deal Project**.



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

OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	Comments	Status
OR0000334	OFF001	Office Supplies Unlimit...	QTMAR2	595.13	ZAR	31/03/2022	Julanda Kessler	1.00	15.00		A
OR0000336	BTG0001	Big Bargains	B6004	462.88	ZAR	01/04/2022	Julanda Kessler	1.00	15.00		A
OR0000337	OFF001	Office Supplies Unlimit...	B3009	595.13	ZAR	04/04/2022	Julanda Kessler	1.00	15.00		A
OR0000338	OFF001	Office Supplies Unlimit...	3010	595.13	ZAR	04/04/2022	Julanda Kessler	1.00	15.00		A

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;
 - **The new deal project has been created, reference no. [reference number]**
8. Click on **OK**.



9. You will return to the **Sales Order** screen.

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 screen
- Add new 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 - [Order Number]** screen. The same procedure can be followed from any of the above mentioned screens.

1. From the **View Customer Order - [Order Number]** screen,
2. Click the print option that you require.

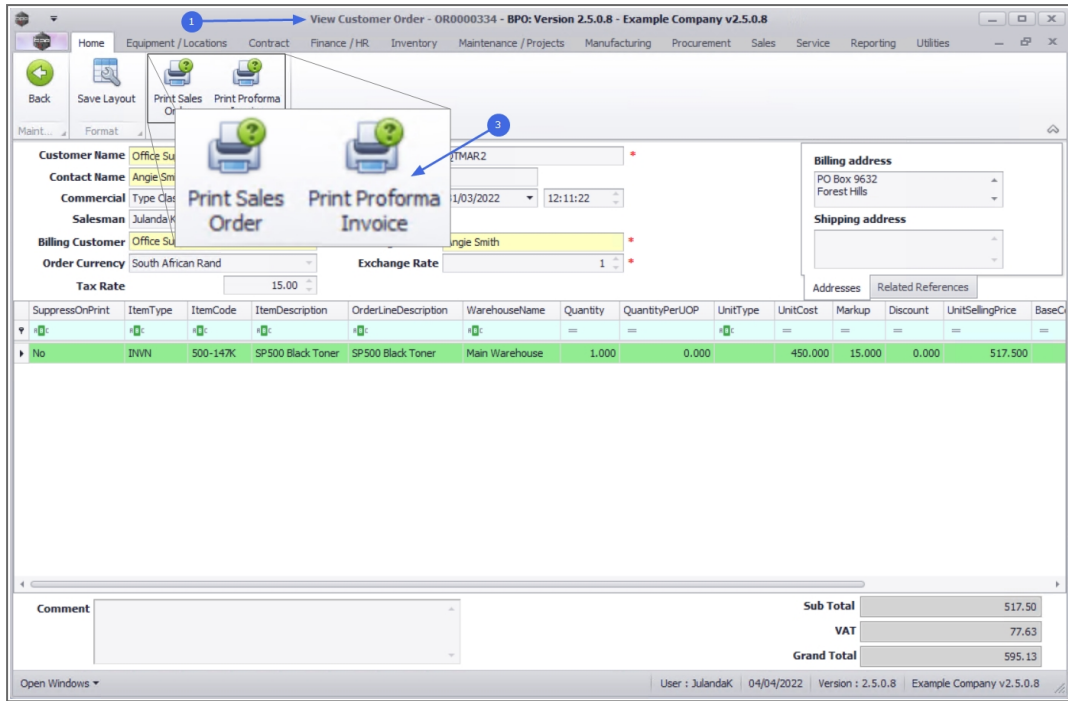


Print Sales Order



Print Proforma Invoice

3. The example has **Print Proforma Invoice** selected.

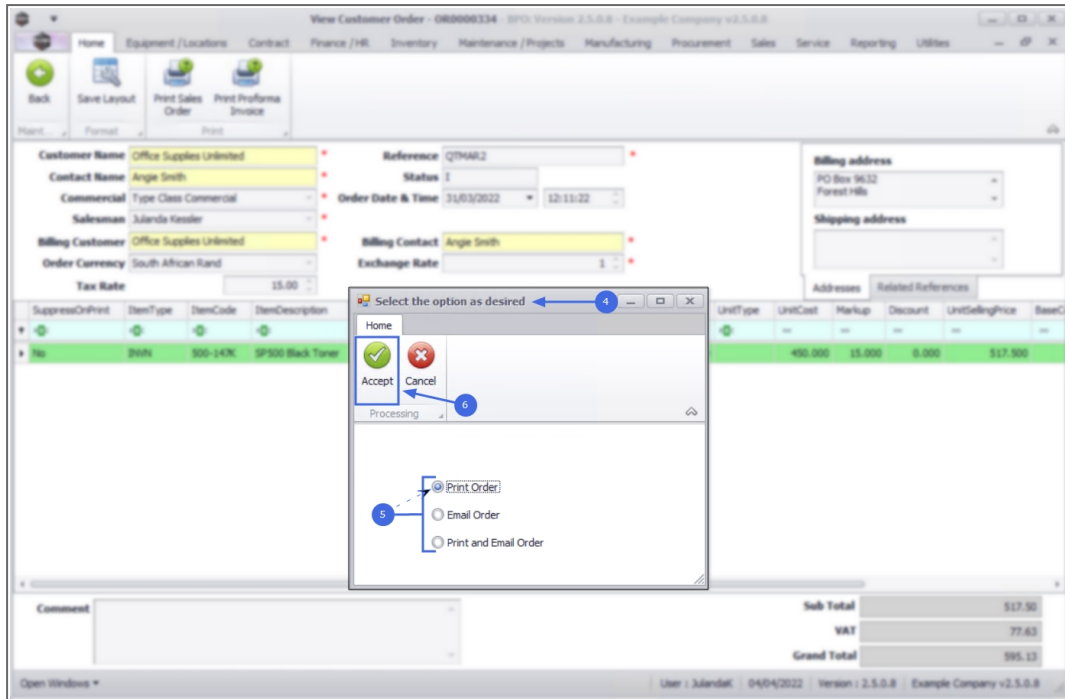


4. The **Select the option as desired** message will display.
5. Click on the **radio button** to select either **Print Order**, **Email Order** or **Print and Email Order**.



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

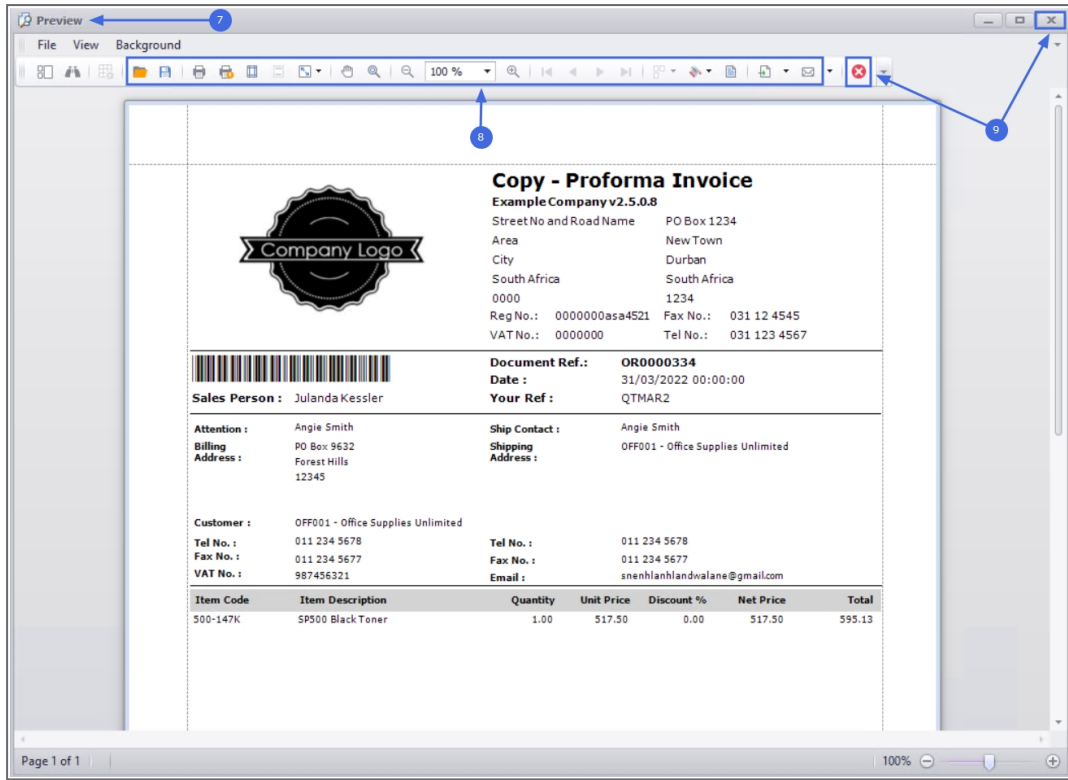
- The example has **Print Order** selected.
6. Click on **Accept** to proceed.



7. The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
8. 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.
9. 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](#)



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