

SALES

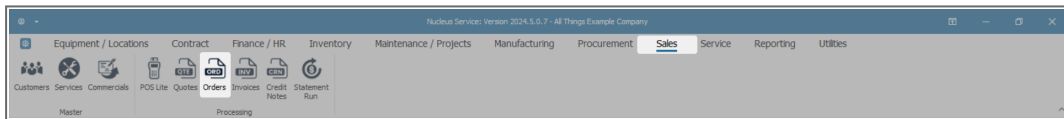
ORDERS – ADD SALES ORDER

You will encounter a **Customer** and a **Billing Customer** on both the Sales Order and the Sales Invoice.

✔ **Customer** (Main Customer) - is the client who is ordering the parts / services.

✔ **Billing Customer** - is the client / finance party who will be paying for the parts / services.

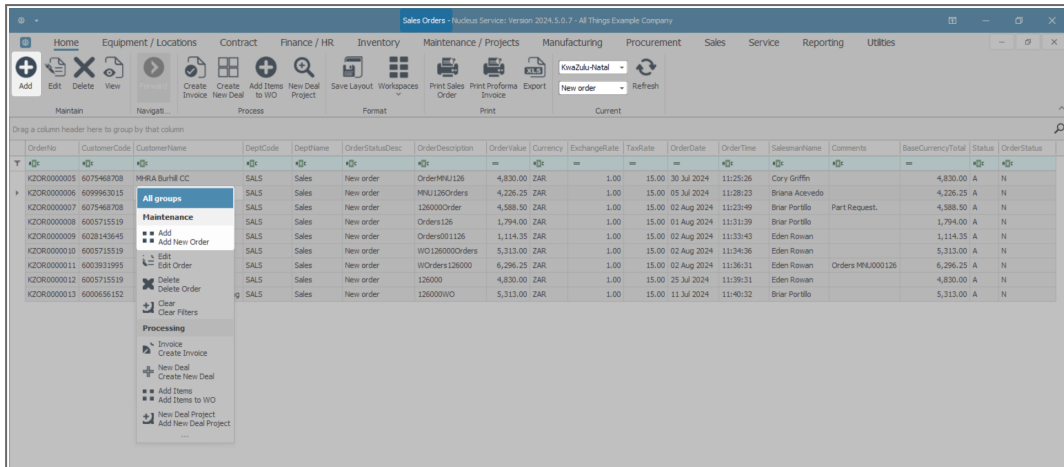
Ribbon Select **Sales > Orders**



- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where you need to create an order.
 - The example has **KwaZulu-Natal** selected.
- An Order can be created from any **Status**.
 - The example has **New Order** selected.
- Click on **Add**.



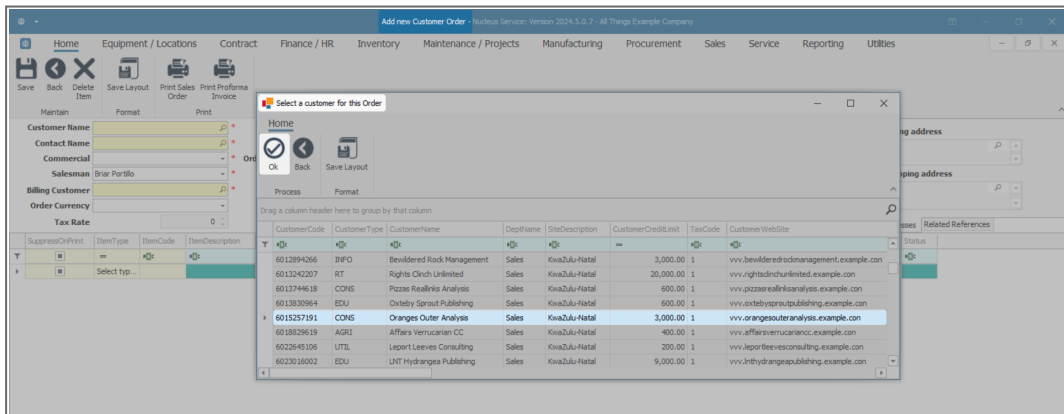
Short cut key: **Right click** on a **row** in the data grid to display the **Maintenance** menu list. Click on **Add**.



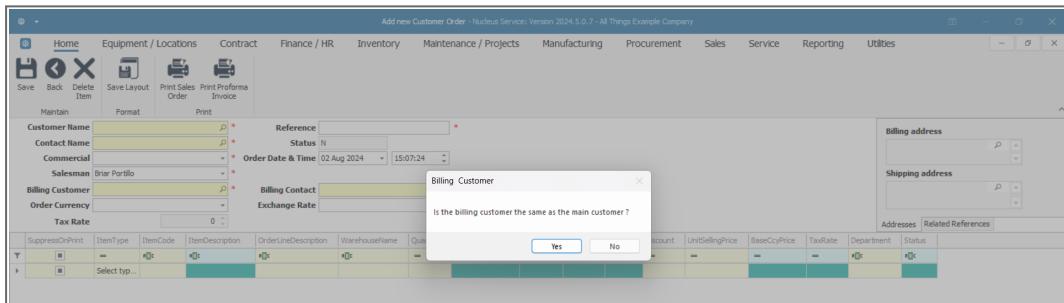
- The **Add new Customer Order** screen will be displayed.

SALES ORDER HEADER

- **Customer Name:** Click on the **search** button to select the customer.
 - The **Select a customer for this Order** screen will display.
 - Select the **row** of the customer you are placing the order for.
 - Click on **OK**.

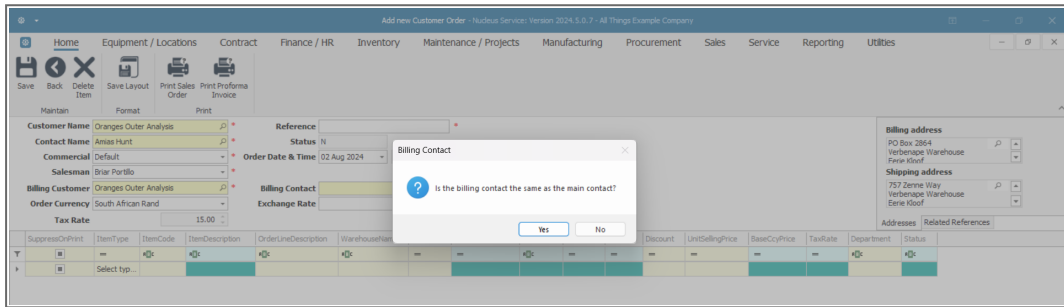


- When you receive the **Billing Customer** message to confirm -
 - **Is the billing customer the same as the main customer?**
 - The Main Customer refers to where the items are being shipped.
 - The Billing Customer refers to the Account Holder who will pay for the goods/services.
 - Click **Yes** if the Billing Customer is the same as the Main Customer.
- or**
- Click **No** if the Billing Customer is different to the Main Customer.
 - In this example, **Yes** has been selected.

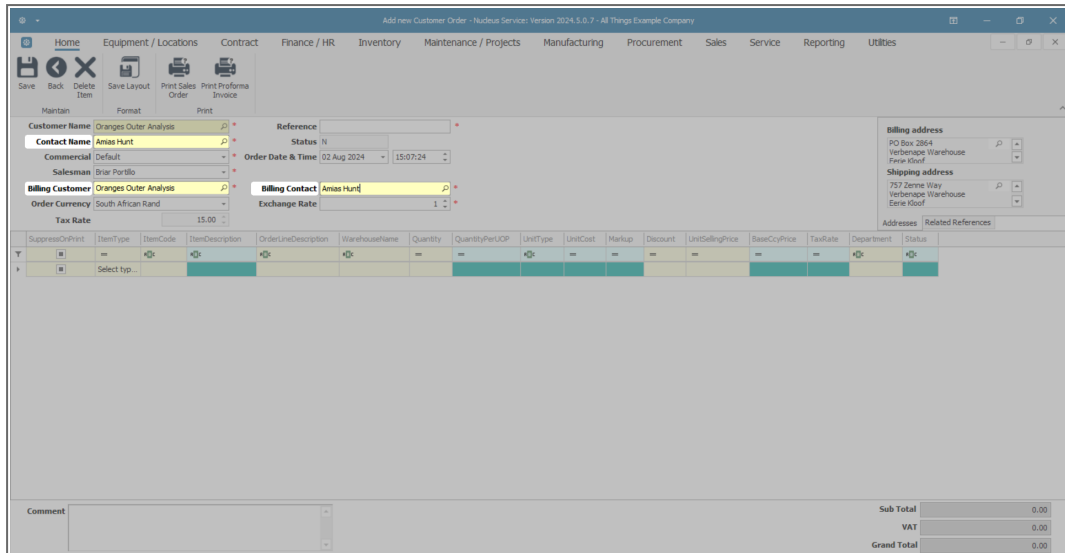


- If you have selected **Yes** - then the **Customer Name**, **Billing Customer** and **Billing address** will auto populate.
 - If you have selected **No** - then only the **Customer Name** will be updated.
- **Contact Name:** The contact is the person who will be receiving the invoice at the customer and in most cases, this would be the Accounts Contact.
- To select the contact, click on the **search** button. If the **Contact Name** field does not **auto populate**, then the **Select a contact for this Invoice screen** will display for you to select the row of the Contact person for the Customer.

- When you receive the **Billing Contact** message to confirm -
 - **Is the billing contact the same as the main contact?**
 - Click **Yes** if the Billing Contact is the same as the Main Customer.
- or
- Click **No** if the Billing Contact is different to the Main Customer.
 - In this example, **Yes** has been selected.



- **Billing Customer:** This field will already be populated if the Customer is the same as the Billing Customer. If not, click on the **search button** to select the customer who will be paying for this invoice.
- **Billing Contact:** This field will already be populated if the Billing Contact is the same as the Customer Contact. Otherwise, click on the **search button** to select the Billing Contact, following the steps for adding a Customer Name.

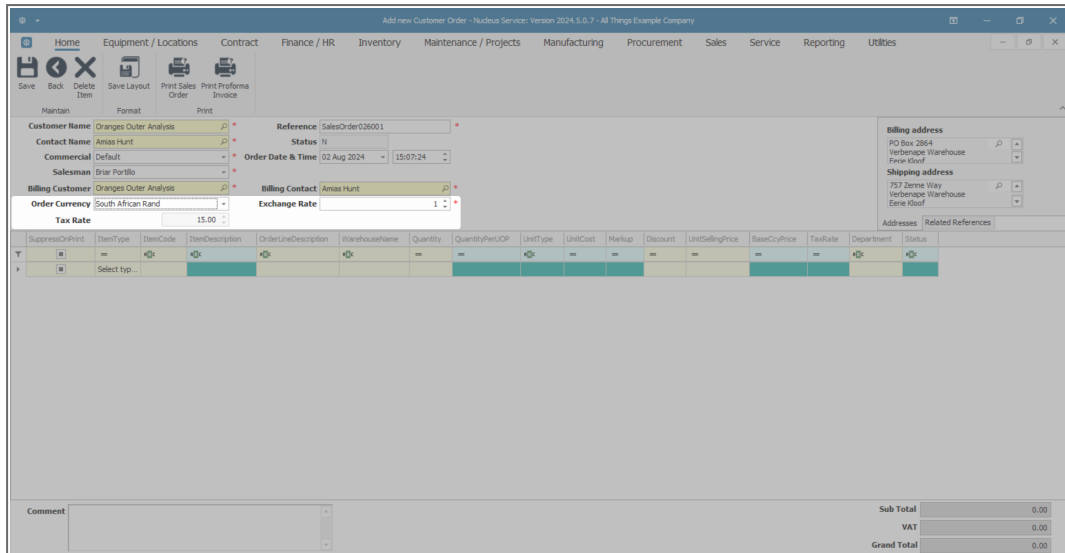


- **Commercial:** This is the default **commercial**¹ configured for the customer. A different commercial can be selected by clicking on the **drop-down arrow**, if required.
- **Salesman:** This field will auto populate with the person currently logged in to the system. Click on the **drop-down arrow** to select an alternative salesman from the list, if required.
- **Reference:** Type in a reference for the sales order.
- **Status:** The status field will display [N] for **New** by default.
- **Order Date and Time:** The current date and time that the order has been placed, will display.
 - The date can be changed by clicking on the **drop-down arrow** to change the date using the Calendar function, if required.
 - Click on the **arrow indicators** to adjust the time, if required.

¹Commercial is the mark up structure for the item. The original price of the item, including the company profit margin

FINANCIAL HEADER

- **Order Currency:** This field will populate based on the currency set up for the customer. Use the drop-down **arrow** to select an alternative currency from the drop-down menu, if required.
- **Tax Rate:** This field will populate based on the currency set up for the customer and can not be changed on this screen.
- **Exchange Rate:** This field will populate based on the exchange rate set up in the system. Type in or use the **arrow indicators** to adjust the exchange rate, if required.



ADDRESSES TAB

- **Billing Address¹**: The billing address needs to be added to the customer before linking the order. If the Billing Address has not populated, click on the **search** button to select the billing address.
- **Shipping Address²**: This field needs to be completed. If the Shipping Address field has not populated, click on the **search** button to select the address where the goods can be shipped to.

¹A Billing address is where the invoice for an order will be sent, whether it is a business-to-business (commercial) order or consumer order. You must define a billing address for any order.

²A shipping address is the address where an order will be sent.

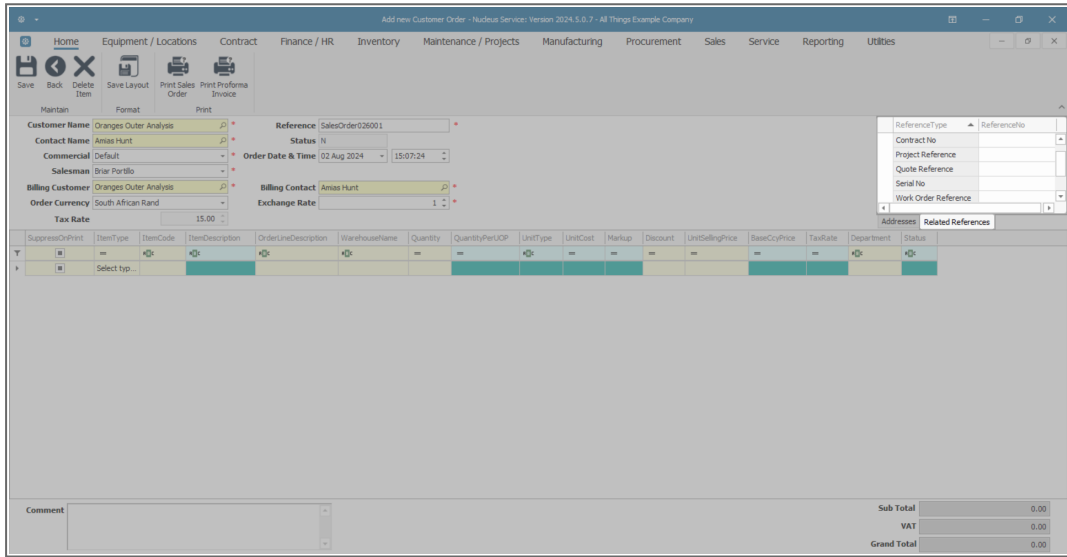
RELATED REFERENCES TAB

- Click on the **Related References** tab.
- The sales order that you are creating, may be linked to one or more of the following reference types:
 - Serial No
 - Call Reference
 - Contract No
 - Location
 - Project Reference
 - Quote Reference
 - Work Order Reference

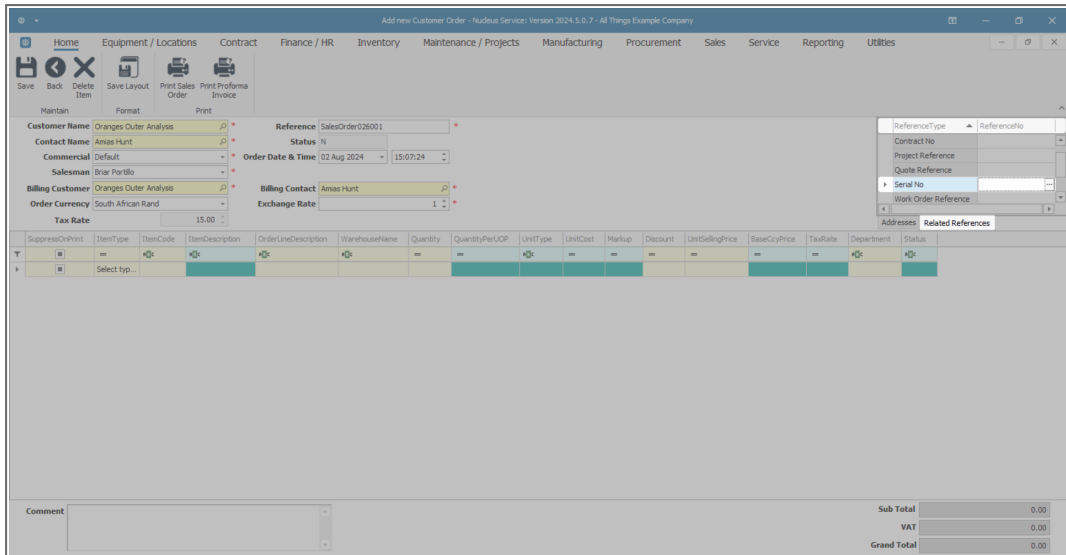
- Note on using the Reference No's:

- You can select a Reference Type and Reference No before you select a customer for all types, except the **Call Reference Type** which requests that a customer is selected first.

- With the other Types, when the **Reference Type** and **No** are selected, the linked customer details will populate the **Customer** and **Financial** heading fields.
- When the **Reference Type** and **No** are selected, other Reference No's linked to the initially selected number can also populate other Reference fields.



- Click in the **Reference No** field of the Reference Type you wish to link to this order, to display the **ellipsis** button.
 - (Use the scroll bar to scroll to move left or right to reveal the ellipsis button if it is hidden.)
 - The example has **Serial No** selected.

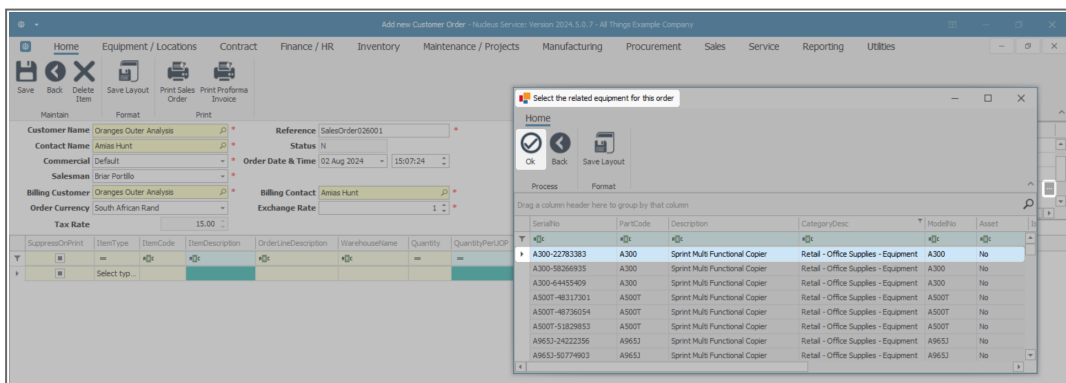


- Click on the **ellipsis** button to display the **Select the related equipment for this order** screen.



The 'Select...[]' screen that displays will directly correspond to the Reference Type that has been selected. For example, if the Contract No Type is selected, then the 'Select the related contract for this order' screen will display.

- Click on the **row** of the item that you wish to link to this sales order.
- Click on **OK**.



- The selected **Serial No** will populate the **Related References** frame.
- The example also includes a **Call Reference** linked to the selected serialized item, as the customer request was made from a Call. Additionally, there is a **Contract Reference** linked to the selected serialized item.

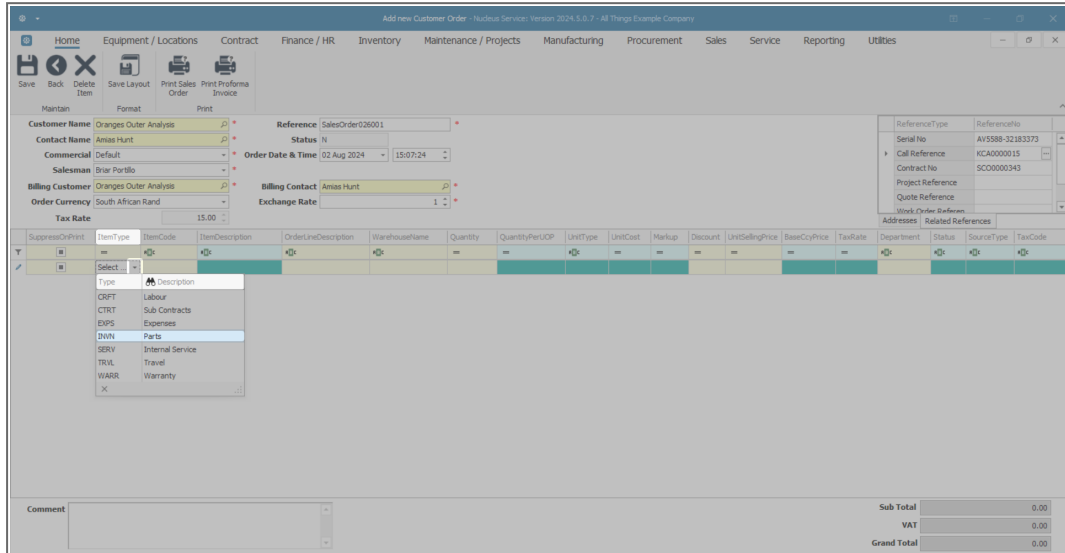


There can be different variations of this, e.g., a selected Order No can have a **Work Order** or **Project Reference** linked to it.

ADD SALES ORDER ITEMS

- Click on the **Select type...** text box below **Item Type** to display the **drop-down arrow**.
- Clicking on the **drop-down arrow** will display the **Item Type** drop-down list.
- From the list, select one of the following:
 - **CRFT** Labour craft, i.e. Technician
 - **CTRT** Sub Contracts / Third Party Labour/Service
 - **EXPS** Expenses

- **INVN** Parts
- **SERV** Internal Labour/Service
- **TRVL** Travel
- **WARR** Warranty

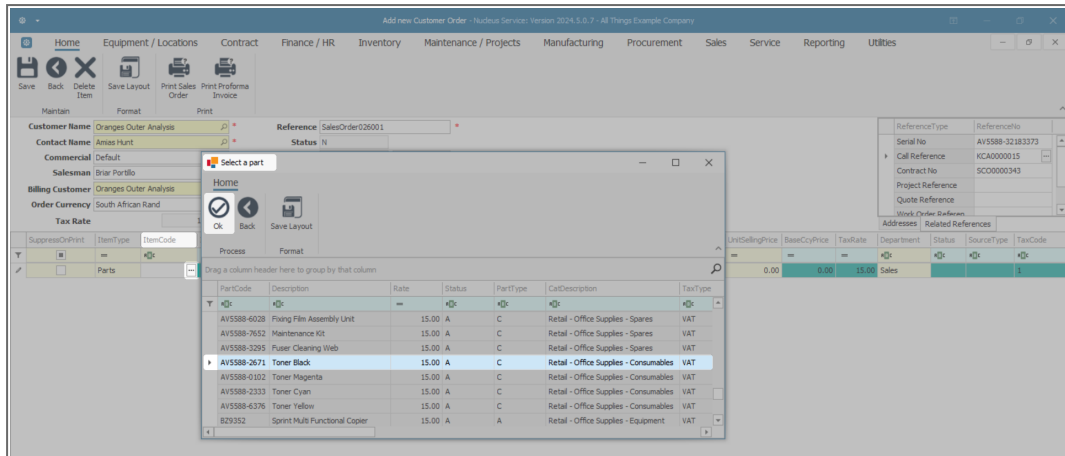


- The example has **Parts** as the Item Type selected.
- Click in the **Item Code** text box to display the **ellipsis** button.
- Clicking on this button will display the **Select a []** screen.



The **Select a []** screen will always correspond with the Item Type initially selected, e.g., if Labour was initially selected then the **Select a craft** screen will display.

- Click on the **row** of the **Part** you wish to select.
- Click on **OK**.



Add additional line items

- On the next available line, click in the text box of the **Item Type** column below the item you have just added. Refer to Add Sales Order Items for details on how to complete the line item.



Click only on the **Suppress on Print** column check boxes of the items that you do not want visible on the printed Sales Invoice. This will not affect the **Sub/Grand Total** but the selling prices that are visible will not match up with the invoice totals.

Edit the Quantity, Discount and Unit Selling Price

- To adjust the **Quantity**, **Discount** and **Unit Selling Price**, click in the required field and type in or use the directional **arrows** to select the required value.
- **Suppress on Print** check box: The check box must only be selected for the line items that you do **not** want printed on the Sales Invoice.



The Sub/Grand Total will not be affected, but the visible selling prices will not match up with the invoice totals.

SuppressOrPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status	SourceType	TaxCode
	Parts	AV5588-2671	Toner Black	Toner Black	K2 - Main	1.00	0.00	ea	350.00	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	SP2020-2671	Toner Black	Toner Black	K2 - Main	1.00	0.00	ea	354.83	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	A300-2333	Toner Cyan	Toner Cyan	K2 - Main	1.00	0.00	ea	450.00	0.00	0.00	540.00	540.00	15.00	Sales	A		1

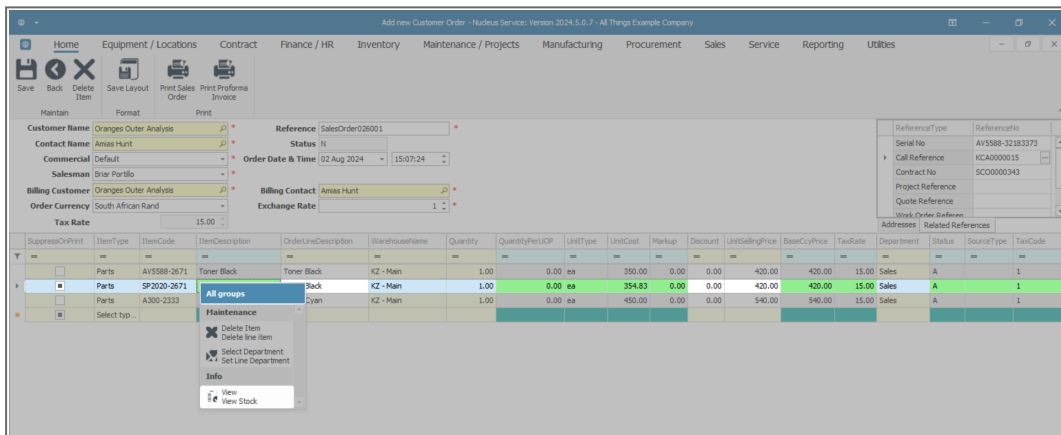
- Use the scroll bar to scroll across the screen to view the **Department** column.
- If the department was not populated then add a Department by clicking on the **ellipsis** button to select the Department for this item.

SuppressOrPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status	SourceType	TaxCode
	Parts	AV5588-2671	Toner Black	Toner Black	K2 - Main	1.00	0.00	ea	350.00	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	SP2020-2671	Toner Black	Toner Black	K2 - Main	1.00	0.00	ea	354.83	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	A300-2333	Toner Cyan	Toner Cyan	K2 - Main	1.00	0.00	ea	450.00	0.00	0.00	540.00	540.00	15.00	Sales	A		1

View Stock

When creating an Order, the salesman is able to check the **stock quantities** of items that he wishes to include in the Order. This enables him to manage the customer's expectations. For example, if there is short stock of a particular item, the customer can be informed that there may be a delay in delivery or that there is an alternative substitute item available, which the customer may prefer to ensure that an order is received timeously.

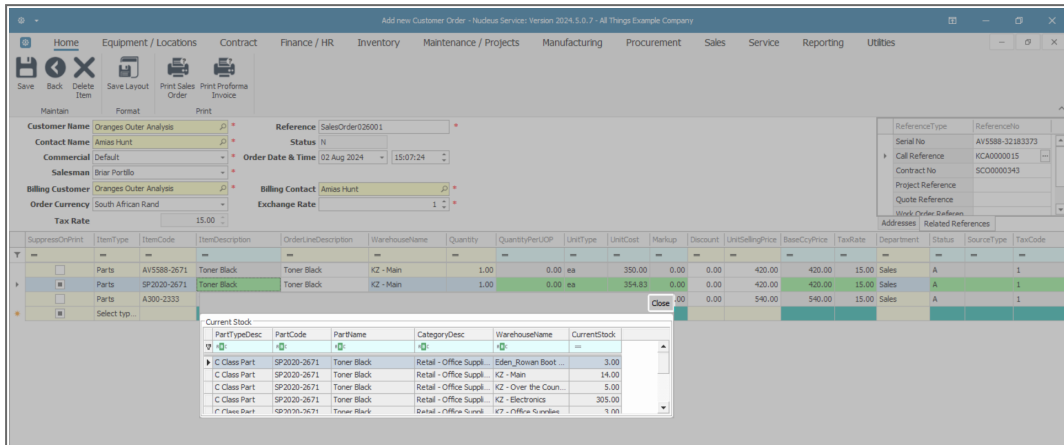
- **Right click** anywhere in the **row** of the item that you wish to view the stock quantity of.
- The **All groups** drop-down menu will display.
- Select **View - View Stock**.



- The **Current Stock** data grid will be displayed.
- Each row represents a **warehouse** that contains stock of the item.
- Scroll across the data grid, if necessary, until you can view the stock **quantities**, e.g., Current Stock or Net Stock, in each warehouse.
- This list now also returns alternate parts in stock : Version Compatibility¹.

¹Nucleus Service v2.4.0.11 or higher

- Click on **Close** or anywhere outside the current Stock data grid to close the window.

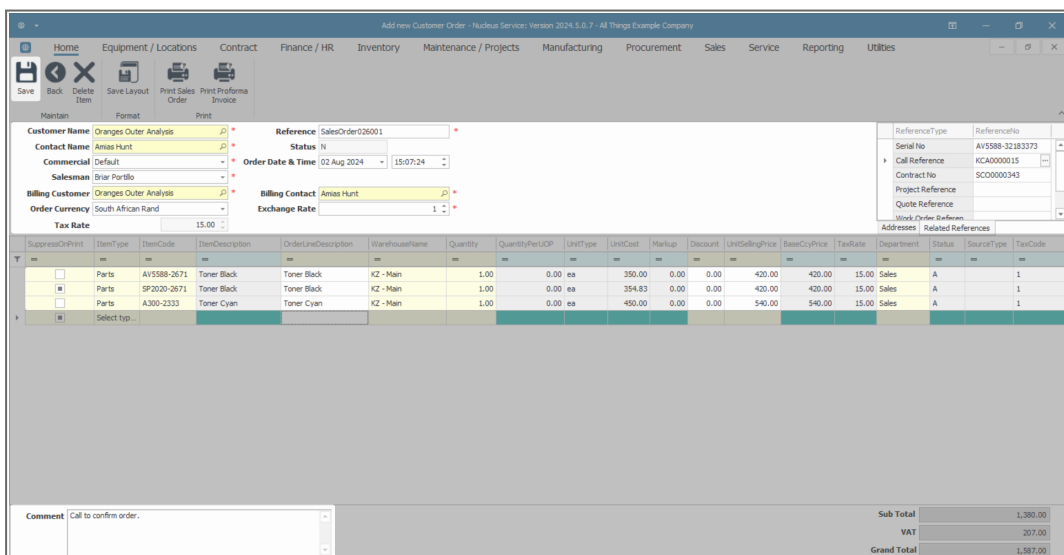


ADD COMMENTS

- Click inside the Comments text box to **type** a comment relating to this order.

SAVE THE SALES ORDER

- When you have finished adding the new customer sales order, click on **Save**.



- The **Sales Orders** listing screen will be updated with the new sales order you have created.

OrderNo	CustomerCode	CustomerName	DeptCode	DeptName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	SalesmanName	Comments	BaseCurrencyTotal	Status	OrderStatus
KZOR000005	6075468708	MHRA Burhill CC	SALS	Sales	New order	OrderMNU126	4,830.00	ZAR	1.00	15.00	30 Jul 2024	11:29:26	Cory Giffin		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	Brian Portillo	Part Request.	4,588.50	A	N
KZOR000008	6005715519	Carns Osofoff CC	SALS	Sales	New order	Orders126	1,794.00	ZAR	1.00	15.00	01 Aug 2024	11:31:39	Brian Portillo		1,794.00	A	N
KZOR000009	6028143645	GLJ 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	Carns Osofoff 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	PDMA Management	SALS	Sales	New order	WOders126000	6,296.25	ZAR	1.00	15.00	02 Aug 2024	11:36:31	Eden Rowan	Orders MNU000126	6,296.25	A	N
KZOR000012	6005715519	Carns Osofoff 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	6000566152	Geierling Protocol Outsourcing	SALS	Sales	New order	126000WO	5,313.00	ZAR	1.00	15.00	11 Jul 2024	11:40:32	Brian Portillo		5,313.00	A	N
KZOR000014	6015257191	Oranges Outer Analysis	SALS	Sales	New order	SalesOrder026001	1,587.00	ZAR	1.00	15.00	02 Aug 2024	15:07:24	Brian Portillo	Call to confirm order.	1,587.00	A	N

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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