

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.

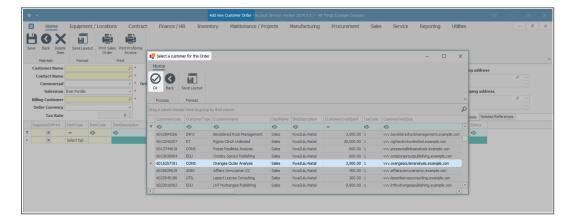


										Se	les Orders - Nuclei													
۲	Home	Б	quipm	ent / Loca	ations	Contr	act	Finance /	HR I	ventory	Maintenanc	e / Project	s	Manu	ufacturing	Procure	ement S	ales Se	rvice Repo	rting Utilities			- 0	1
Ð		X	2	Θ	6	RR	0	Q	Ĩ						KwaZulu-Natal	- .								
Add	Edit D	elete V	liew	Forward	Create	Create New Deal	Add Items	s New Deal Project		ut Workspac	es Print Sales I Order		a Expo	ort [New order	Refres	r							
	Maintai	in		Navigati		Pr	ocess			Format		Print			Current									
		er here b																						
r ∎∐c		s∐c		#[]c			*[]c	#[]C	*[]c		*[]c	-	-0		=	-	-	#[]c	#[]c	*[]c	=	#[]c	*[]c	
KZO	R0000005	607546	8708	MHRA Burhi	II CC		SALS	Sales	New	rder	OrderMNU126	4,83	0.00 ZA	AR	1.00	15.	00 30 Jul 2024	11:25:26	Cory Griffin		4,830.00	A	N	
KZO	20000006	609996	3015	All group			SALS	Sales	New o	rder	MNU126Orders	4,22	5.25 ZA	AR	1.00	15.	00 05 Jul 2024	11:28:23	Briana Acevedo		4,226.25	A	N	
KZO	R0000007	607546	8708			_	SALS	Sales	New	rder	126000Order	4,58	8.50 ZA	AR	1.00	15.	00 02 Aug 2024	11:23:49	Briar Portillo	Part Request.	4,588.50	A	N	
	R0000008			Mainten	ance	- 1	SALS	Sales	New e	rder	Orders126	1,79	4.00 ZA	AR	1.00	15.	00 01 Aug 2024	11:31:39	Briar Portillo		1,794.00	A	Ν	
	R0000009			Add Add	New Order		SALS	Sales	New (rder	Orders001126		4.35 ZA		1.00		00 02 Aug 2024		Eden Rowan		1,114.35		N	
	R0000010			; x Edit			SALS	Sales	New e	rder	WO126000Orde		3.00 ZA		1.00		00 02 Aug 2024		Eden Rowan		5,313.00		N	
	R0000011			Edit C			SALS	Sales	New o	rder	WOrders 126000		5.25 ZA		1.00		00 02 Aug 2024		Eden Rowan	Orders MNU000126			N	
	R0000012			X Delet	te te Order		SALS	Sales	New o		126000		0.00 ZA		1.00		00 25 Jul 2024		Eden Rowan		4,830.00		N	
KZO	R0000013	600065	6152			g	SALS	Sales	New	rder	126000WO	5,31	3.00 ZA	AR	1.00	15.	00 11 Jul 2024	11:40:32	Briar Portillo		5,313.00	A	N	
				Processi	ing																			
				Creat	ice ite Invoice																			
				+ New Creat	Deal ite New Dea	al																		
					Items to W																			
				ta New Add I	Deal Proje New Deal P	ct Project																		

• 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.

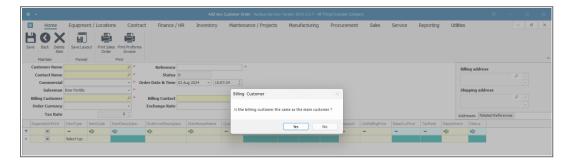




- When you receive the Billing Customer message to confirm -
 - Is the billing customer the same as the main customer?
 - The <u>Main</u> Customer refers to where the items are being shipped.
 - The <u>Billing</u> Customer refers to the Account Holder who will pay for the goods/services.
- Click **Yes** 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.

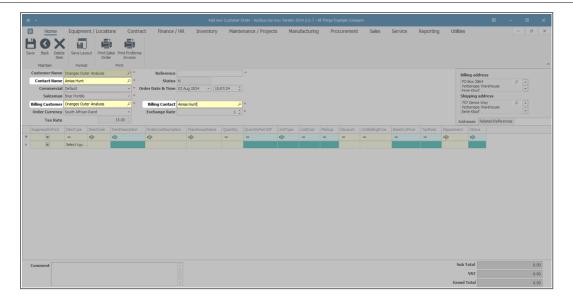
or

- Click **No** if the Billing Contact is different to the Main Customer.
 - In this example, **Yes** has been selected.

۰ -				
Home Equipment / Locations Contract Finan	e / HR Inventory Maintenance / Projects	Manufacturing Procurement Sales	Service Reporting Util	ities – ø ×
Save Back Delete Tem Save Layout Print Sales Print Proforma Order Invoice				
Maintain Format Print				^
Customer Name Oranges Outer Analysis P * Referen	• •			Billing address
Contact Name Amias Hunt P * Sta	Billing Contact	×		PO Box 2864 P
Commercial Default - * Order Date & Ti	e 02 Aug 2024 - Billing Contact	~		Verbenape Warehouse
Salesman Briar Portilo 👻 *				Shipping address
Billing Customer Oranges Outer Analysis P * Billing Cont	ct ? Is the billing contact the	same as the main contact?		757 Zenne Way P
Order Currency South African Rand - Exchange R	te			Eerie Kloof
Tax Rate 15.00 🗘		Yes No		Addresses Related References
SuppressOnPrint ItemType ItemCode ItemDescription OrderLineDes	iption WarehouseNam	Discount UnitSellingPrice	BaseCcyPrice TaxRate Departm	ent Status
T = 40c 40c 40c				*Dc
Select typ				

- **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.

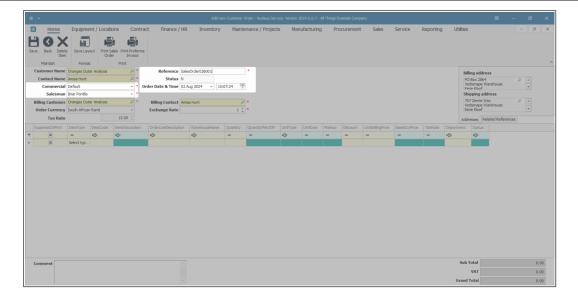




- **Commercial:** This is the default **commercial**¹ configured for the customer. A different commercial can be selected by clicking on the **drop-down arrow**, if required.
- Salesman: This field will auto populate with the person currently logged in to the system. Click on the **drop-down arrow** 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

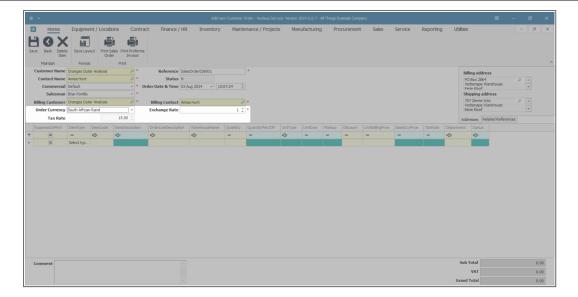




FINANCIAL HEADER

- 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.

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

Help v2024.5.0.7/1.0 - Pg 7 - Printed: 21/08/2024

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.



Home	Equipmer	nt / Locatio	ns Contr	act Finance / H	IR Inventory	Mainte	enance / Projects	s Man	ufacturing	Pro	ocurement	Sales	Service	Reporting	Utilitie	es		-	ø	×
HOX			- E																	
Save Back Dele	te Save Lavo		es Print Proform																	
Iter		Order		0																
Maintain	Format		Print																	
Customer Name	Oranges Oute	r Analysis	• م	Reference S	alesOrder026001]•									Billing addr	ess			
Contact Name	Amias Hunt		• م	Status N												PO Box 286		ρ		
Commercia	l Default		- * *	Order Date & Time	12 Aug 2024 - 15	:07:24 🗘										Verbenape \ Ferie Kloof	Narehouse		¥	
Salesman	Briar Portillo		* *													Shipping ad				
Billing Customer	oranges Oute	r Analysis	• م	Billing Contact	imias Hunt		•									757 Zenne V Verbenape V	Vay Narebouse	ρ		
Order Currency	South African	Rand	*	Exchange Rate		1 0]•									Eerie Kloof			Ψ	
Tax Rate	•		15.00 🗘												A	dresses R	elated Referen	nces		
SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	n WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Departmen	t Status				
	-	R∐C	a∐c	*[]:	s⊡c	-	-	#[]c	-	-	-	-	-	-	#[]c	#[]c				
•	Select typ																			

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 <u>before</u> you select a customer for all types, except the Call Reference Type which requests that a customer is selected first.

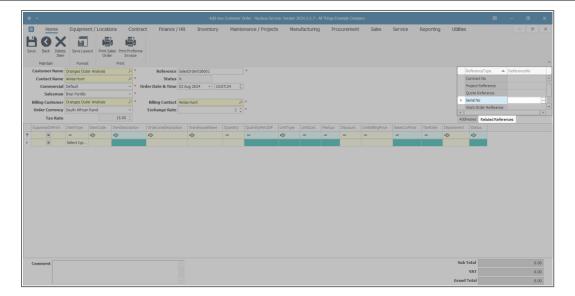


- With the other Types, when the **Reference Type** and **No** are selected, the linked **customer details** will populate the **Customer** and **Financial** heading fields.
- When the **Reference Type** and **No** are selected, other Reference No's linked to the initially selected number can also populate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

											Al Things E:	kample Comp	any					œ	- 0	1 >
Home	ne	Equipm	ent / Locat	tions Cont	tract Finance / HF	Inventory	Maint	enance / Project	s Man	ufacturing	Pro	ocurement	Sales	Service	Reporting	Utilitie	5		-]	0 >
- 0 -	Y		1 🖬																	
ave Back D	Delete	Save La		Sales Print Proform	110															
	Item		Ord	der Invoice																
Maintain		Form		Print				1.												
Customer Na Contact Na				• م • م	Reference Sal	esOrder026001		J.								-	ReferenceTy Contract No		Reference	lo
Contact Na Comme					Order Date & Time 02	Aug 2024 - 15	:07:24										Project Refer			
		Briar Portillo			order bate a rime of												Quote Refer			
Billing Custo	mer	Dranges Ou	ter Analysis	• م	Billing Contact Am	as Hunt	£	•									Serial No			
Order Curre	ency	South Africa	n Rand	Ŧ	Exchange Rate		1 0	•								1	Work Order I	Reference		
Tax R	Rate			15.00 🗘													dresses Rela	ited Referen	ices	
SuppressOnPr		ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status			
		-	R∐C	a∏c	*[]:	* 🗆 c	-	-	#[]c	-	-	-	-	-	-	¥∐c	*[]c			
Comment																Sub	Total			0.00
Comment																	Total VAT			0.00

- 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.

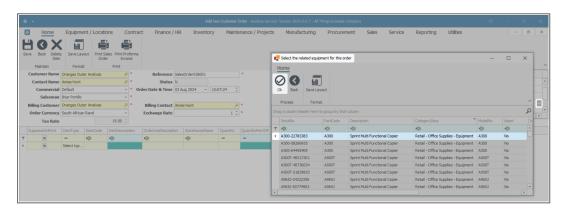




• Click on the ellipsis button to display the Select the related equipment for this order screen.

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

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

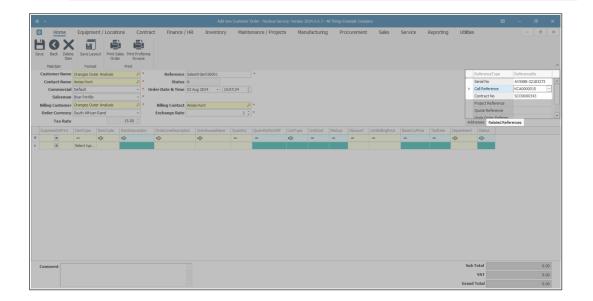


• Click on OK.



- 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 <u>different</u> 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** dropdown list.
- From the list, select <u>one</u> 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

Home	Equipme	nt / Locations	s Cont	tract Finance	/ HR Inv	ventory Maii	ntenance / P	rojects Mai	nufacturing	Proc	urement	Sales	s Service	e Report	ting L	Jtilities		-	- 0	×
Save Back Delet Item		Order	Print Profor Invoice																	
Customer Name			۲ (C	Reference	SalesOrder026	001	•										ceType			
Contact Name			•													Serial N			-32183373	-
Commercial				Order Date & Time		* 15:07:24	0									> Call Ref	erence	KCA000	0015	
Salesman	Briar Portillo															Contrac	t No	SC0000	0343	
Billing Customer	Oranges Oute	er Analysis	• م	Billing Contact	Amias Hunt		P •									Project	Reference			
Order Currency	South African	Rand	*	Exchange Rate		1	÷ •										Reference			
Tax Rate			15.00 0													Mork Or Addresses	rder Referen	ferences		
SuppressOnPrint	ItemType	ItemCode	ItemDescript	tion OrderLine	Description	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status		e TaxCo	de
Y I	-	#∐c	∎∏c	a∏c		#[]c	-	-	*[]c	-	-	-	-	-	-	#[]C	n∏c	a∏c	#∐c	
	CTRT EXPS INVN SERV TRVL	At Description Labour Sub Contracts Expenses Parts Internal Service Travel Warranty																		
Comment																Sub Total VAT			0.0	.00

- 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 <u>Labour</u> was initially selected then the Select a <u>craft</u> screen will display.

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



۲	Home	Equipment	: / Loca	tions	Contract	Finance / HR Inve	ntory M	laintenance	/ Projects	Manufacturing Procurem	ient :	Sales	Service	e Repo	orting	Utilities		-	0	>
H Save	Back Delete	Save Lavour	t Print	-	Fint Proforma															
	Item			der	Invoice															
	Maintain	Format		Pri	nt															
Cus	stomer Name	Oranges Outer	Analysis		* م	Reference SalesOrder0260	D1	•								Referen	nceType	Reference	sNo	
0	ontact Name	Amias Hunt			* م	Status N										Serial N		AV5588-3		
	Commercial	Default			📕 Select a par	t				_		×				 Call Ref 	ference	KCA00000		
	Salesman	Briar Portillo			-											Contra		SC000003	343	
Billi	ing Customer	Oranges Outer	Analysis		Home												Reference			
Or	der Currency	South African R	and		\oslash												Reference			
	Tax Rate			1	Ok Back	Save Layout											rder Referen Related Ref			
	pressOnPrint	ItemType It	temCode										UnitSellingPrice	BaseCcyPrid	e TaxRate	Department	Status	SourceType	TaxCode	
r		- 4	0c		Process	Format							-	-	-	#[]c	#[]c	a∐c	#[]c	
1		Parts		-	Drag a column he	eader here to group by that column						P	0.00	0.	.00 15.	00 Sales			1	
					PartCode	Description	Rate	Status	PartType	CatDescription	TaxTyp	æ								
					T All:	([]:	-	#[]c	#[]c	AD:	ø∐c									
					AV5588-602	8 Fixing Film Assembly Unit	15	.00 A	С	Retail - Office Supplies - Spares	VAT									
					AV5588-765	2 Maintenance Kit	15	A 00.	С	Retail - Office Supplies - Spares	VAT									
						5 Fuser Cleaning Web	15	A 00.	С	Retail - Office Supplies - Spares	VAT									
					AV5588-267			A 00.	с	Retail - Office Supplies - Consumable										
						2 Toner Magenta		.00 A	С	Retail - Office Supplies - Consumable										
						13 Toner Cyan		A 001	С	Retail - Office Supplies - Consumable										
						16 Toner Yellow		.00 A	С	Retail - Office Supplies - Consumable										
					BZ9352	Sprint Multi Functional Copier	15	A 00.	A	Retail - Office Supplies - Equipment										
				L	·															

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 <u>only</u> 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.

۲						Add new Customer	Order - Nudeu	us Service: Version 20	24.5.0.7 - A	l Things Exam	nple Compa	пу					œ	-	a x
© Li Save	Home Back Delete Item		Order	s Contract	Finance / HR In	ventory Mainti	enance / Pr	ojects Manu	ifacturing	Procu	urement	Sales	Service	Report	ing UI	tilties			ØX
B	ustomer Name Contact Name Commercial Salesman illing Customer Order Currency Tax Rate	Amias Hunt Default Briar Portilo Oranges Oute	er Analysis	- *	Reference SalesOrder02 Status N Date & Time 02 Aug 2024 ling Contact Anias Hunt change Rate		•									Quote F Work O	o ierence	Referencel AV5588-32 KCA00000 SCO00003 erences	183373 * 15 ···
S	uppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department		SourceType	TaxCode
Ŧ		-	-	-	-	-	-	-	-	-	-			-	-	-	-	-	-
_			AV5588-2671		Toner Black	KZ - Main	1.00			350.00			420.00	420.00			A		1
			SP2020-2671 A300-2333	Toner Black	Toner Black	KZ - Main KZ - Main	1.00			354.83			420.00	420.00		Sales Sales	A		1
	I	Select typ	A300-2333	Toner Cyan	Toner Cyan	NZ - Main	1.00	0.00	ea	450.00	0.00	0.00	540.00	540.00	15.00	Sales	A		1
c	omment															Sub Total			1,380.00
															G	VAT irand Total			207.00 1,587.00

- 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.

٥	Home	Equipmer	nt / Locations	s Contract	Finance / HR I	Inventory M	laintenance /	Projects	s	Manufacturing	Procurement	Sales	Service	Reporting	U	tilities			. 0	
4	0 X																			
۲	Back Delete	Save Lavo		Print Proforma																
sve	Item	save Layo	Order	Invoice																
	Maintain	Format		Print											_					
Cu	stomer Name	Oranges Oute	r Analysis	* م	Reference SalesOrder	026001	•			Select a department	t for this item		-	- 🗆	×	Refer	enceType	Referen	ceNo	
0	Contact Name	Amias Hunt		* م	Status N					Home						Serial	No	AV5588	3218337	13
	Commercial	Default		- * Order I	ate & Time 02 Aug 202	4 - 15:07:24	÷				-					→ Call R	eference	KCA000	0015	
	Salesman	Briar Portillo		- *					6	∕∕ €							act No	SC0000	0343	
Bill	ing Customer	Oranges Oute	r Analysis	P * Bil	ing Contact Amias Hunt		ب			Ok Back Sav	e Layout						ct Reference			
0	der Currency	South African	Rand	- Exc	hange Rate		1 0 *			Process F	ormat				_		e Reference			
	Tax Rate			15.00 🔅											-		Order Refere			
		ItemType	ItemCode						Dra		ere to group by that colur				P	Departmen	t Status			ode
-		=	-	=	-	-	=	=		DEPTDepartment	DEPTDepartmentDescr	ption		Status		-	-	=	-	
		Parts	AV5588-2671	Toner Black	Toner Black	KZ - Main	1	1.00	T	- 14 -	∎⊡c			a∏c		Sales	A		1	
		Parts	SP2020-2671	Toner Black	Toner Black	KZ - Main	1	1.00		ADMIN	Administration			A	-11	Sales	A		1	
		Parts	A300-2333	Toner Cyan	Toner Cyan	KZ - Main	1	1.00		ADMIN	Administration			A	-11	Sales	A		1	
		Select typ								Cater	Catering			A	- 11					
										CTRT	Contracts			A .						
										CTRT	Contracts			A .						
										DEV	Development			Â						
										DOCS	Documentation			A						
										DOCS	Documentation			A						
										DocsDepts	DocsDepts									

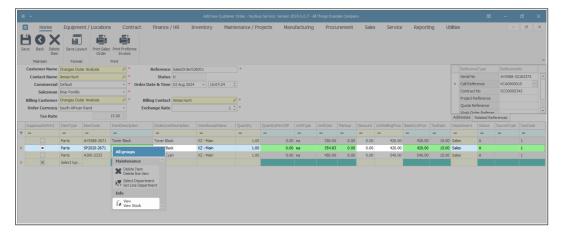
Help v2024.5.0.7/1.0 - Pg 14 - Printed: 21/08/2024



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 ware-house.
- 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 new Cust	mer Order - Nudeu	is Service: Version 202	24.5.0.7 - All Th	ings Exam	ple Compar	ту					æ	-	o ×
E	Home	Equipmer	nt / Location	s Contract	Finance / H	IR Inver	ntory M	aintenance / Pr	ojects Manu	facturing	Procu	rement	Sales	Service	Reporti	ng U	tilties			ØX
E Sa	ve Back Delete	Save Layo	ut Print Sales Order	Print Proforma Invoice																
	Maintain	Format		Print																
	Customer Name	Oranges Oute	r Analysis	* م	Reference S	alesOrder02600	1	•									Referen	сеТуре	Reference	No
	Contact Name			* م	Status N												Serial No		AV5588-33	
	Commercial	Default		 Order 	Date & Time 0	2 Aug 2024	* 15:07:24	÷									 Call Refi 		KCA00000	
	Salesman			~ *													Contrac		SC000003	343
	Billing Customer	Oranges Oute	r Analysis	۶ * Bi	illing Contact A	imias Hunt		* م									Project Project R	teference		
	Order Currency	South African	Rand	* Ex	change Rate			1 0 *										eterence der Referen		
	Tax Rate			15.00 🗘													Addresses			
	SuppressOnPrint	ItemType	ItemCode	ItemDescription	OrderLineDe	scription Wa	arehouseName	Quantity	QuantityPerUOP	UnitType Ur	itCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status	SourceType	TaxCode
٣	-	-	-	-	-	-		-	-			-	-	-	-	-	-	-	-	-
		Parts	AV5588-2671	Toner Black	Toner Black	KZ	- Main	1.00	0.00	ea	350.00	0.00	0.00	420.00	420.00	15.00	Sales	A		1
×.				Toner Black	Toner Black	KZ	- Main	1.00	0.00	ea	354.83	0.00	0.00	420.00	420.00		Sales	A		1
			A300-2333									Close .00	0.00	540.00	540.00	15.00	Sales	A		1
*		Select typ		Current Stock																
				PartTypeDesc	PartCode	PartName		egoryDesc	WarehouseName	CurrentStock										
				Q 40:	* 0 ¢	1 0 0	* O ¢		(D)	-		^								
				C Class Part	SP2020-2671	Toner Black			Eden_Rowan Boot	3.00										
				C Class Part C Class Part	SP2020-2671 SP2020-2671	Toner Black Toner Black		al - Office Suppl	KZ - Main KZ - Over the Coun	14.00		_								
				C Class Part	SP2020-2671 SP2020-2671	Toner Black		al - Office Suppl		305.00										
				C Class Part	SP2020-2071				KZ - Office Supplier	3.00		*								

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**.

Home									deus Service: Version :									Œ	_	٥
	Equipmer	nt / Location	s Cont	tract Fina	nce / HR	t Inve	ntory Main	itenance /	Projects Mar	ufacturing	Proc	urement	Sale	s Service	Reporti	ng U	tilties			Ø
ve Back Delet	Savelavr	ut Print Sales																		
Item		Order	Invoice																	
Maintain	Format		Print					_												
Customer Name		er Analysis	۹.			esOrder02600	01	•										nceType	Referen	
Contact Name Commercial			• م	S Order Date &	tatus N		* 15:07:24	0									Serial N		AV5588- KCA000	32183373
	Briar Portilo			Order Date &	Time 02 A	Aug 2024	* 15:07:24	*									Contra		SCO000	
Billing Customer		ir Analysis	• م	Billing Co	atact Amin	as Must		P •										Reference		
Order Currency			*	Exchange		03 FMTC		- -									Quote i	Reference		
Tax Rate			15.00					•										Related Refe		
SuppressOnPrint	ItemType	ItemCode	ItemDescript	Kon Ord	erLineDescr	riation W	/arehouseName	Quantity	QuantityPerUOP	LinitTune	LinitCost	Markup	Discount	InitSellingPrice	RaseCryPrice	TayRate			_	TayCode
=	=	=	=	=				=	=	=	=	=	=	=	=	=	=	=	=	=
	Parts	AV5588-2671	Toner Black	Ton	er Black	K	Z - Main	1	.00 0.0) ea	350.00	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	SP2020-2671	Toner Black	Ton	er Black	K	Z - Main	1	.00 0.0) ea	354.83	0.00	0.00	420.00	420.00	15.00	Sales	A		1
	Parts	A300-2333	Toner Cyan	Ton	er Cyan	K	Z - Main	1	.00 0.0) ea	450.00	0.00	0.00	540.00	540.00	15.00	Sales	A		1
		A300-2333	Toner Cyan	Ton	er Cyan	K	Z - Main	1	.00 0.0) ea	450.00	0.00	0.00	540.00	540.00	15.00	Sales	A	_	1
	Parts	A300-2333	Toner Cyan		er Cyan	K	Z - Main	1	.00 0.0	2 ea	450.00	6.60	0.00	540.00	540.00	15.00	Sales	A		1

Help v2024.5.0.7/1.0 - Pg 16 - Printed: 21/08/2024



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

						Sak												
E	B Home	Equipn	nent / Locations Conti	ract Fi	inance / HR	Inventory	Maintenance /	Projects	Manu	facturing	Procurem	ient Sal	es Ser	/ice Repo	rting Utilities			0)
¢		Xa)) H	0	Q		.			waZulu-Natal -	€							
A	dd Edit D	elete View	Forward Create Create Invoice New Dea	Add Items to WO	New Deal Project	Save Layout Workspace		t Proforma Es Invoice	oport [lew order 🚽	Refresh							
	Maintai	in	Navigati P	rocess		Format		Print		Current								
10	g a column head	ler here to group	p by that column															
	OrderNo	CustomerCode	CustomerName	DeptCode	DeptName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	SalesmanName	Comments	BaseCurrencyTotal	Status	OrderStatu
r	∎⊡c	#∐c	10c	#∐c	#∐c	1 []:	n∏c	-	n∏c	-	-	-	n∐c	4[]C	∎⊡c	-	#[]c	*[]c
	KZOR000005	6075468708	MHRA Burhill CC	SALS	Sales	New order	OrderMNU126	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	А	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	А	N
	KZOR000008	6005715519	Cairns Oscroft CC	SALS	Sales	New order	Orders 126	1,794.00	ZAR	1.00	15.00	01 Aug 2024	11:31:39	Briar Portillo		1,794.00	Α	N
	KZOR000009	6028143645	GUI 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	А	N
	KZOR0000010	6005715519	Cairns Oscroft 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	Α	N
	KZOR0000011	6003931995	FDMA Management	SALS	Sales	New order	WOrders 126000	6,296.25	ZAR	1.00	15.00	02 Aug 2024	11:36:31	Eden Rowan	Orders MNU000126	6,296.25	A	N
	KZOR0000012	6005715519	Cairns Oscroft 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	А	N
	KZOR0000013	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
	K70P000014	6015257191	Oranges Outer Analysis	SALS	Sales	New order	SalesOrder026001	1.587.00	ZAR	1.00	15.00	02 Aug 2024	15:07:24	Briar Portillo	Call to confirm order.	1.587.00	4	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
- <u>Create Sales Invoice from Sales Order</u>
- Create New Deal Sale / Rental (creates a call)
- <u>Create New Deal Project Sale / Rental</u>

MNU.126.001