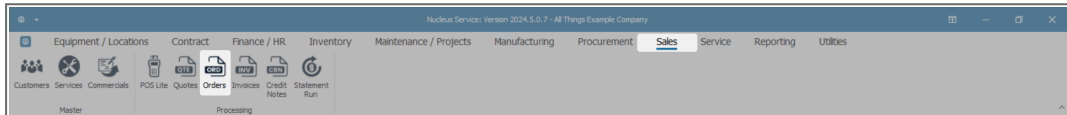


SALES

ORDERS - EDIT SALES ORDER

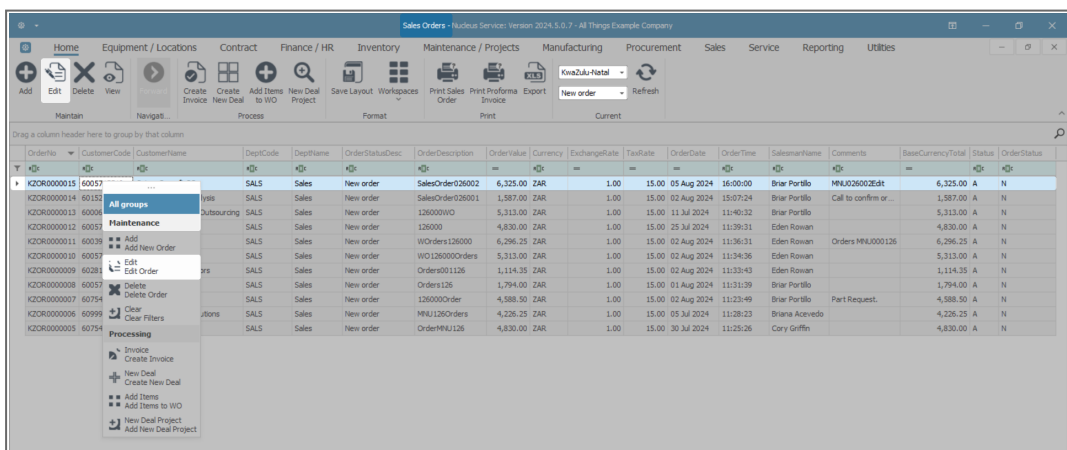
Ribbon Select **Sales > Orders**



- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the Sales Order is located.
 - The example has **KwaZulu-Natal** selected.
- To edit an Order ensure that the **Status** is set to **New Order** or **Proforma**.
 - The example has **New Order** selected.
- Select the **row** of the Sales Order that you wish to **edit**.
- Click on **Edit**.



Short cut key: Right click on the selected **row** in the data grid to display the **All Groups** menu list. Click on **Edit**.



- The **Edit Customer Order - KZOR []** screen will be displayed.

HEADER INFORMATION

- **Customer Name:** Click on the **search button** to select an alternative customer name.
- **Contact Name:** Click on the **search button** to select an alternative customer contact.
- **Commercial:** This is the default commercial configured for the customer. Click on the **drop-down arrow** to select an alternative commercial from the list.
- **Salesman:** Click on the **drop-down arrow** to select an alternative salesman from the list.
- **Billing Customer:** To change the billing customer, click on the **search button** to select the customer who will be billed for the order.
- **Reference:** Click in the text box to update the reference number.
- **Status:** The status for the order will display as **[N]** for **New order** or **[F]** for **Pro-forma**.
- **Order Date and Time:** The date and time the order has been placed, will display.
 - To change the date, type in or click on the **drop-down arrow** to choose an alternative date using the Calendar function.
 - To adjust the time, type in or click on the **arrow** indicators.
- **Billing Contact:** Click on the **search button** to select an alternative billing contact.

FINANCIAL HEADER

- **Order Currency:** Click on the **search button** to select an alternative currency from the menu.
- **Tax Rate:** This field will populate based on the currency set up for the customer and cannot be edited from this screen.
- **Exchange Rate:** This will populate based on the exchange rate set up in the system. Use the directional arrows to increase or decrease the exchange rate.

ADDRESSES TAB

- **Billing Address:** A billing address would have been added when you created the Sales Order. A Billing Address needs to be added for the customer before linking the order.
- Only **one** Billing Address can be added.
- **Shipping Address:** A shipping address would have been added when you created the Sales Order. A Shipping Address needs to be added for the customer before linking the order.
- Only **one** Shipping Address can be added.

The screenshot displays the 'Edit Customer Order' window for order ID K20K000015. The 'ADDRESSES TAB' is active, showing the following details:

- Customer Name:** Cairns Oscroft CC
- Contact Name:** Richard Moore
- Commercial:** Default
- Salesman:** Brian Portillo
- Billing Customer:** Cairns Oscroft CC
- Order Currency:** South African Rand
- Tax Rate:** 15.00
- Reference:** SalesOrder026002
- Status:** N
- Order Date & Time:** 05 Aug 2024 16:00:00
- Billing Contact:** Richard Moore
- Exchange Rate:** 1

On the right side, there are dropdown menus for **Billing address** and **Shipping address**. The **Billing address** dropdown is currently empty, while the **Shipping address** dropdown shows the following options:

- PO Box 6805 Dooncan Warehouse Sapphire Forest
- 636 Digital Road Dooncan Warehouse Sapphire Forest

The main table below shows the order items:

SuppressOrPrint	ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Quantity	QuantityPerUoP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status
	Parts	A300	Sprint Multi Functional Copier	Sprint Multi Functional Copier	K2 - Main	1.00	0.00	ea	0.00	0.00	0.00	4,200.00	4,200.00	15.00	Sales	A
	Labour	TECHJ	Technician Junior	Technician Junior		1.00	0.00		0.00	0.00	0.00	1,300.00	1,300.00	15.00	Sales	A

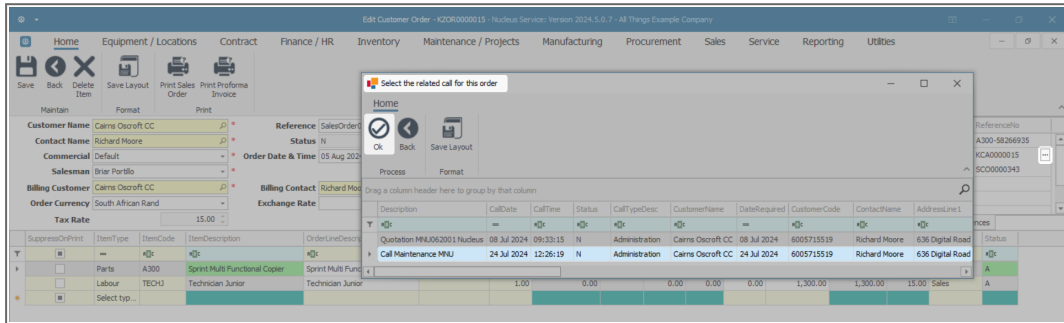
At the bottom right, a summary table shows:

Sub Total	5,500.00
VAT	825.00
Grand Total	6,325.00

RELATED REFERENCES TAB

- Click on the **Related References** tab.
- Any reference numbers that have references **linked** to it, will be displayed. For example if the order is linked to a **Call** or a **Project**, then the Call or Project Number will be displayed.
- To **add** a reference number, or to **change** a reference number, click in the Reference Number column of the Reference Type you wish to work with, to display the **ellipsis** button.

- The example has **Call Reference** selected.
- Click on the **ellipsis** button to display the **Select the related call for this order** list screen.
- Click on the **row** of the Reference number that you wish to add.
- Click on **OK**.



EDIT SALES ORDER ITEMS

- **Suppress On Print Check Box:** Only click on the check box in the line of the item that you do **not** want printed on the Sales Invoice.



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

- **Add Item line:** On the next available line, click in the text box of the **Item Type** column. Refer to [Add Sales Order Items](#) for details on how to complete the line item.

The screenshot shows the 'Edit Customer Order' window for order SalesOrder026002. The order is for Cairns Oscroft CC, with contact Richard Moore. The order date is 05 Aug 2024 at 16:00:00. The order currency is South African Rand with an exchange rate of 15.00. The data grid contains the following items:

SuppressOrPrint	Item Type	Item Code	Item Description	Order Line Description	Warehouse Name	Quantity	Quantity Per UoP	Unit Type	Unit Cost	Markup	Discount	Unit Selling Price	Base Ccy Price	Tax Rate	Department	Status
	Parts	A300	Sprint Multi Functional Copier	Sprint Multi Functional Copier	K2 - Main	1.00	0.00	ea	0.00	0.00	0.00	4,200.00	4,200.00	15.00	Sales	A
	Labour	TECHJ	Technician Junior	Technician Junior		1.00	0.00		0.00	0.00	0.00	1,300.00	1,300.00	15.00	Sales	A

Summary Totals:

Sub Total	5,500.00
VAT	825.00
Grand Total	6,325.00

Delete Item line entry

- To delete an item entry from the order, select the **row** of the item that you wish to remove.
- Click on **Delete Item**.

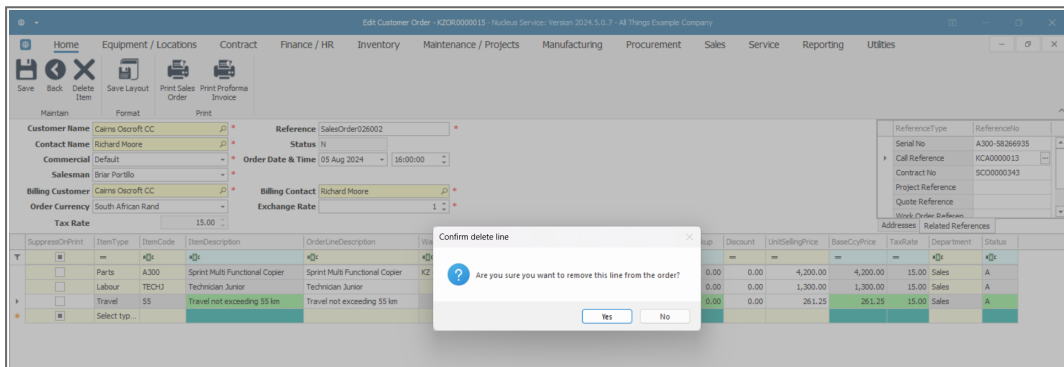


Short cut key: Right click on the selected **row** in the data grid to display the **All Groups** menu list. Click on **Delete**.

The screenshot shows the same 'Edit Customer Order' window, but with the 'All groups' context menu open over the selected row (Labour - TECHJ). The menu options are:

- Maintenance
 - Delete Item
 - Delete line item
 - Select Department
 - Set Line Department
 - Info

- When you receive the **Confirm delete line** message to confirm -
 - **Are you sure you want to remove this line from the order?**
- Click on **Yes** if you are certain about your selection, **or**
- Click on **No** to ignore the request and leave the item line on the order.
 - In this example, **Yes** has been selected.



Edit Quantity, Discount and Unit Selling Price

- Make the relevant adjustments to the **Quantity, Discount, or Selling Price** by typing in the new value or amount, or use the **arrow indicators** to adjust the value or amount.

SAVE SALES ORDER

- When all the necessary changes have been made to the Sales Order, click on **Save** to return to the Sales Orders listing screen.

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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