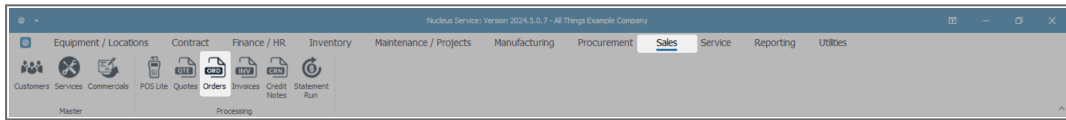


SALES

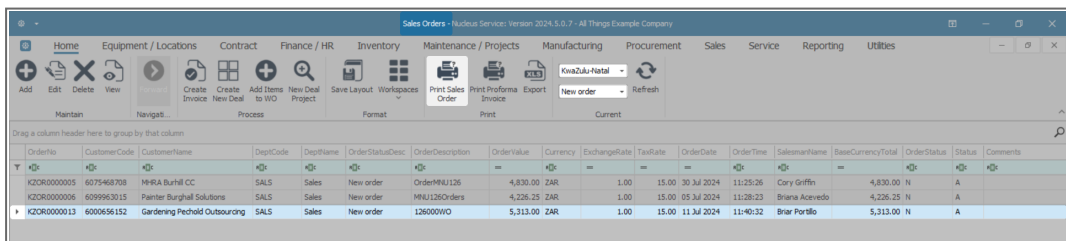
ORDERS – PRINT / EMAIL SALES ORDER

When using the **Email** option to send a Sales Order, please note that it will be mailed via the Nucleus Service Email Service on the server and not from your own MS Outlook.



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.
- Select the **Status**.
 - The image has **New Order** selected.
- Select the **row** of the Sales Order that you wish to **print**.
- Click on **Print Sales Order**.

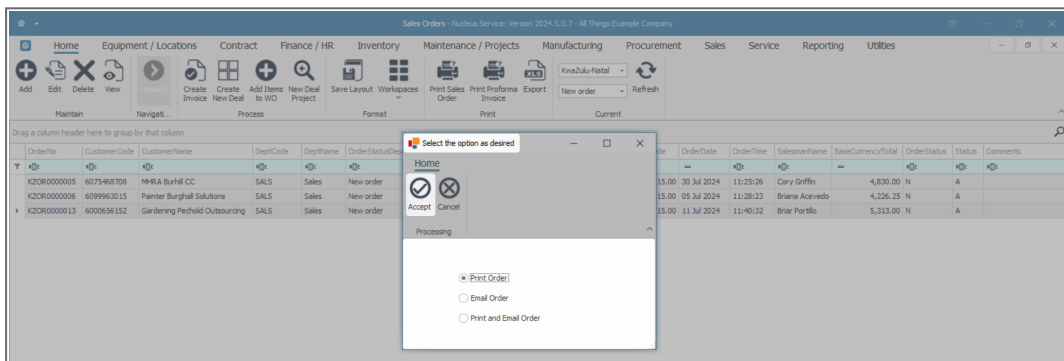


- The **Select the option as desired** screen will display with the following options:
 - **Print Order** (will open the Order in Report Preview to view, print, export or email).

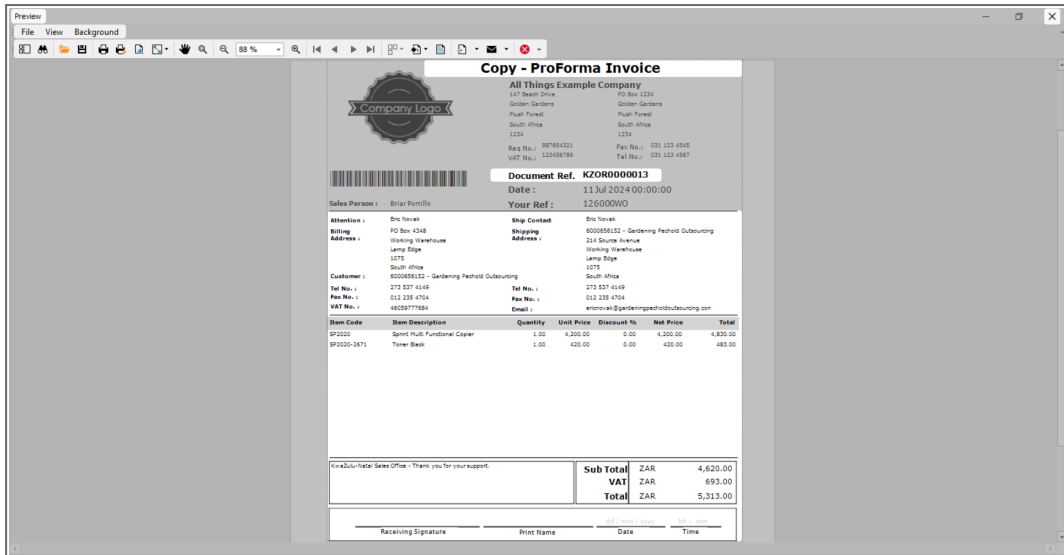
-  **Email Order** (can attach documents, add recipients, the system will create a .PDF and email the Order).
-  **Print and Email Order** (both the Report Preview and Email screens will pop up).

PRINT SALES ORDER

- Click on the **Print Order** radio button.
- Click on **Accept**.



- The **Report Preview** screen will display.
- You can make cosmetic changes to your document as well as **Save, Print, Add a Watermark, Export, or Email** the Sales Order.
- **Close** the Report Preview screen when done.



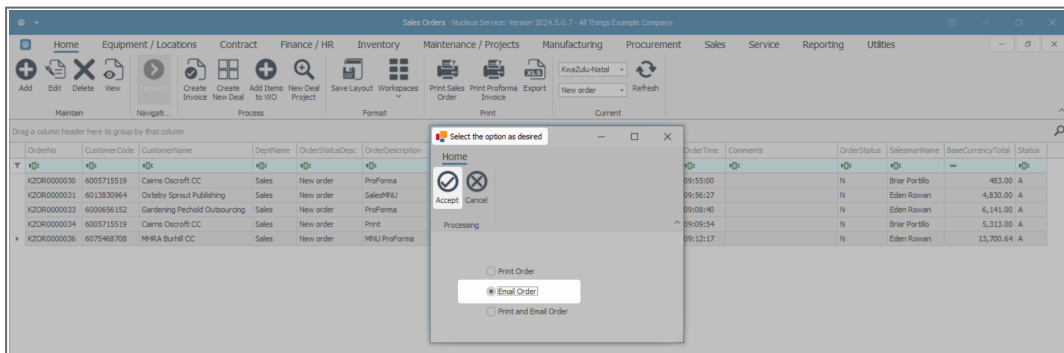
- You will return to the **Sales Orders** listing screen.

EMAIL INVOICE / PRINT AND EMAIL SALES ORDER



If you get an error when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in Nucleus Service and that you have the relevant folder rights to access the shared folder on the server.

- From the **Select the option as desired** screen, select **Email Order** or **Print and Email Order**.
 - The example has **Email Order** selected.
- Click on **Accept**.



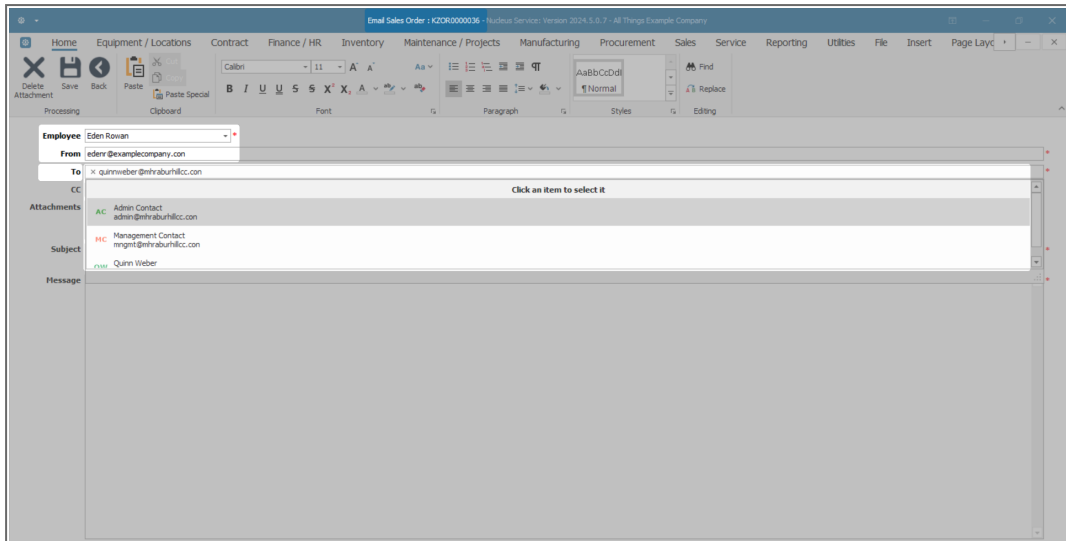
- The **Email Sales Order: KZOR []** screen will display, for both Email Invoice or Print and Email Invoice options.

Email Header Information

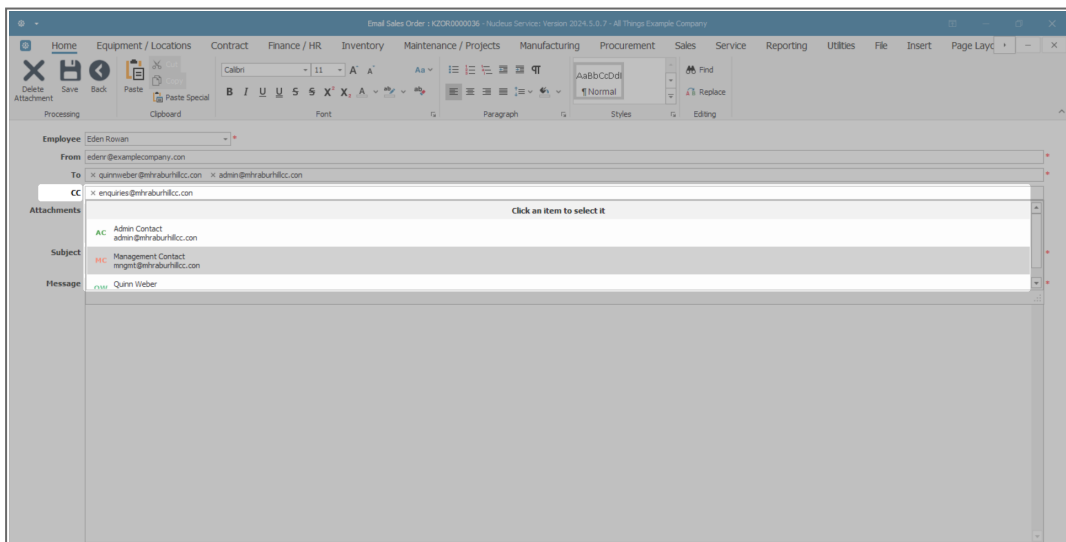
- **Employee:** The employee who is currently logged onto the system will display in the employee field. Click on the **drop-down arrow** to choose an alternative employee name, if required.
- **From:** The email address for the employee selected above will display. This field can be edited if so required.

Searching for and Adding a Second Email Address

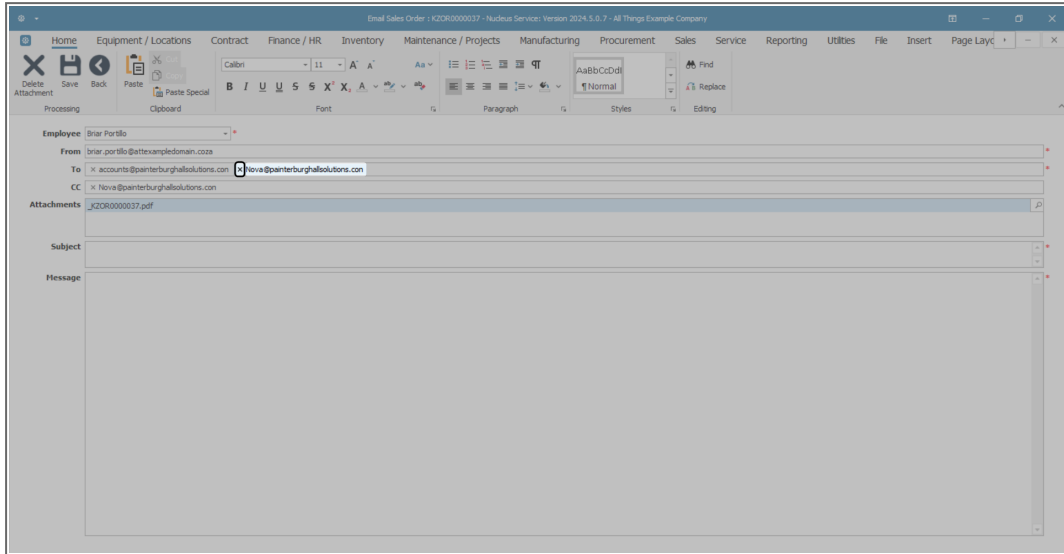
- **To:** This field will auto populate with the email address created for the contact person at the customer. To choose an alternative email or to add a second email address:
 - Click in the **row** to display a **drop-down menu** with the linked email address(es) for this customer.
 - Click on the **email address** of the contact that you wish to add.
 - The selected email address will be added.
 - To add an additional contact person, click in the **row** again to select from the **drop-down menu** and add the contact to the email. The additional email address will be added.



- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.
 - Alternatively click in the **row** to display a **drop-down menu** with the linked email addresses for this customer.
 - Click on the **email address** of the contact that you wish to add.
 - The selected email address(es) will be added to the row.



- If you wish to **remove** an email address from the row, click on the **X** icon.



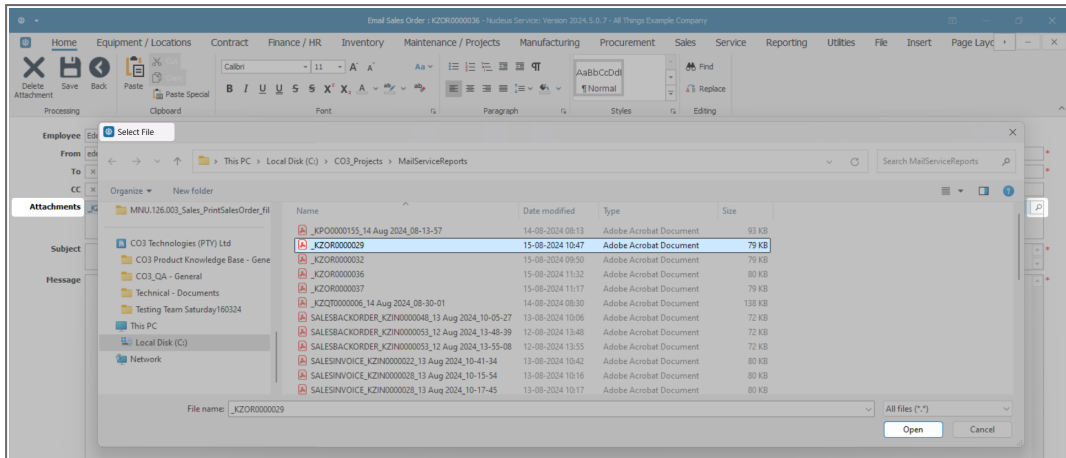
Email Attachments

- **Attachments:** Nucleus Service will create a PDF of the order and attach it automatically (you can attach additional documentation if required).



If there are outstanding parts that have not been issued, a Back Order report will also be attached.

- To add additional documents to be emailed, click on the **search** button in the **Attachments** field to display the Select File screen.
- **Browse** to find the file location then click on the file you wish to attach.
- Once you have selected the file, click on **Open**.

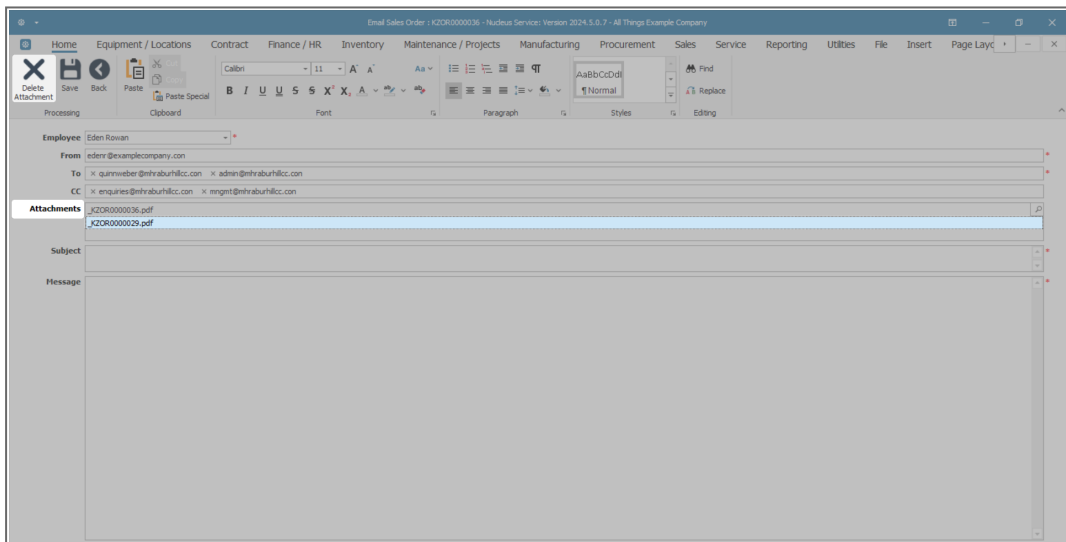


- The attachment will display in the **Attachments** field.

Delete an Attachment

You may choose to remove an attached document.

- Click on the **attachment** you wish to remove.
- Click on **Delete Attachment**.



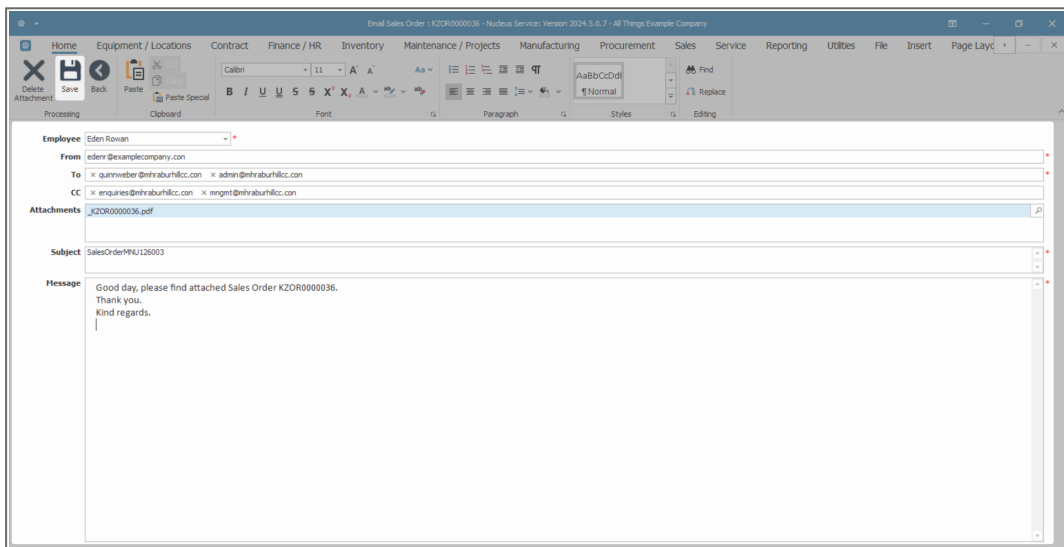
Email Subject and Message

- **Subject:** Click in the text box to type a subject line for the email.



Remember that this is the first reference to the email that your Customer will see.

- **Message:** Click in the text box to type the email text message.
- Once you have finished entering the relevant information, click on **Save**.



The screenshot displays the email composition screen within a web application. The top navigation bar includes various modules like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities, File, Insert, and Page Layout. The email form fields are as follows:

- Employee:** Eden Rowan
- From:** ederr@examplecompany.com
- To:** quinweber@mhrahulilcc.com, admin@mhrahulilcc.com
- CC:** enquires@mhrahulilcc.com, mgmt@mhrahulilcc.com
- Attachments:** KZOR0000036.pdf
- Subject:** SalesOrder#NU126003
- Message:** Good day, please find attached Sales Order KZOR0000036. Thank you. Kind regards.

- You will 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](#)



Orders - Print Sales Order

- [Create Sales Invoice from Sales Order](#)
- [Create New Deal Sale / Rental \(creates a call\)](#)
- [Create New Deal Project Sale / Rental](#)

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