

SALES

ORDERS – CONVERT TO SALES INVOICE

OTC (Over the Counter) **Invoices** are sales invoices that are created without going through the New Deal Sale process (and therefore the costs are not managed via Work In Progress). This is best used for a Shop Sale environment where a customer is invoiced before the stock or service is collected. This would be for a quick stock sale or internal service.

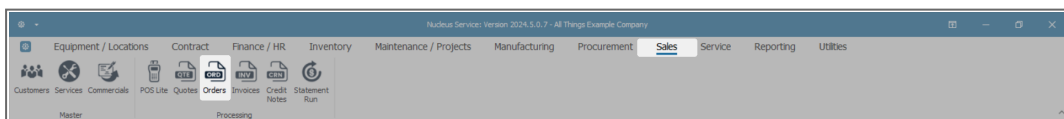
Where delivery, third party services or time would be spent on work, installation or implementation, it is advised to rather follow a [New Deal Sale](#) process.

A Sales Quote or Sales Order can be converted to a **Sales Invoice**, or a **Sales Invoice** can be created directly.

Where stock is invoiced, a part request is created so that the stock can be issued to the invoice - its imperative to have strong controls in place to ensure that stock is issued by the store person.

For a simplified **OTC Invoicing** process for stock items, see [POS Invoicing](#).

Ribbon Select **Sales > Orders**

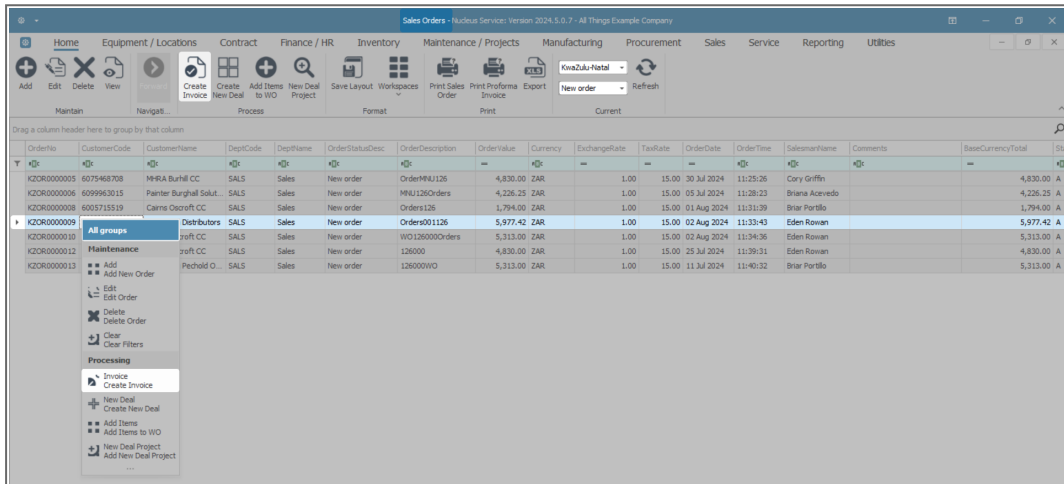


- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the Sales Order is located.
 - The example has **KwaZulu-Natal** selected.

- Select the **Status**.
 - The example has **New Order** selected.
- Select the **row** of the Sales Order that you wish to create an Invoice for.
- Click on **Create Invoice**.

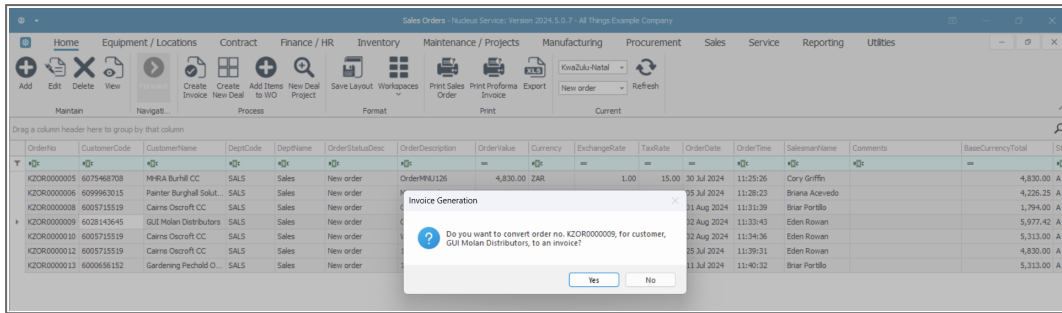


Short cut key: Right click on the selected row to display the All Groups menu list. Click on Invoice.

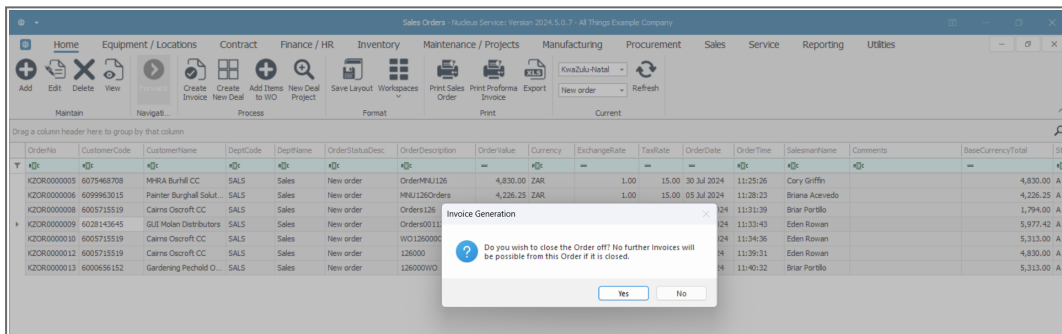


Next you will receive three Invoice Generation messages to confirm.

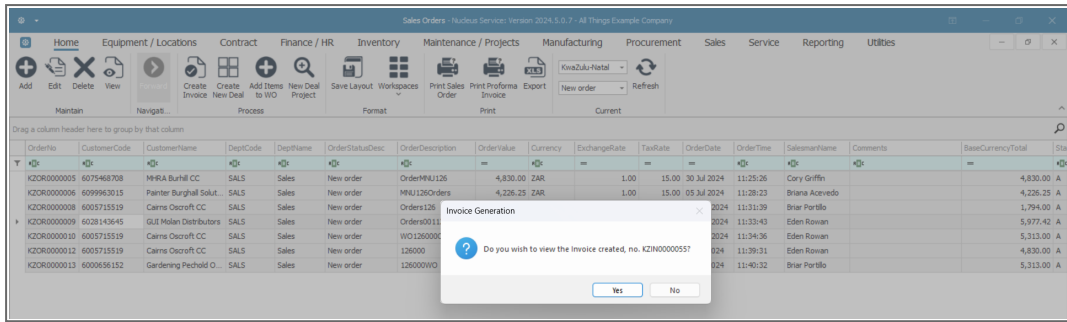
- When you receive the first **Invoice Generation** message to confirm -
 - Do you want to convert order no. KZOR [], for customer, [] to an invoice?
- Click on **Yes**.



- When you receive the second **Invoice Generation** message to confirm -
 - Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.
- Click on **Yes**.

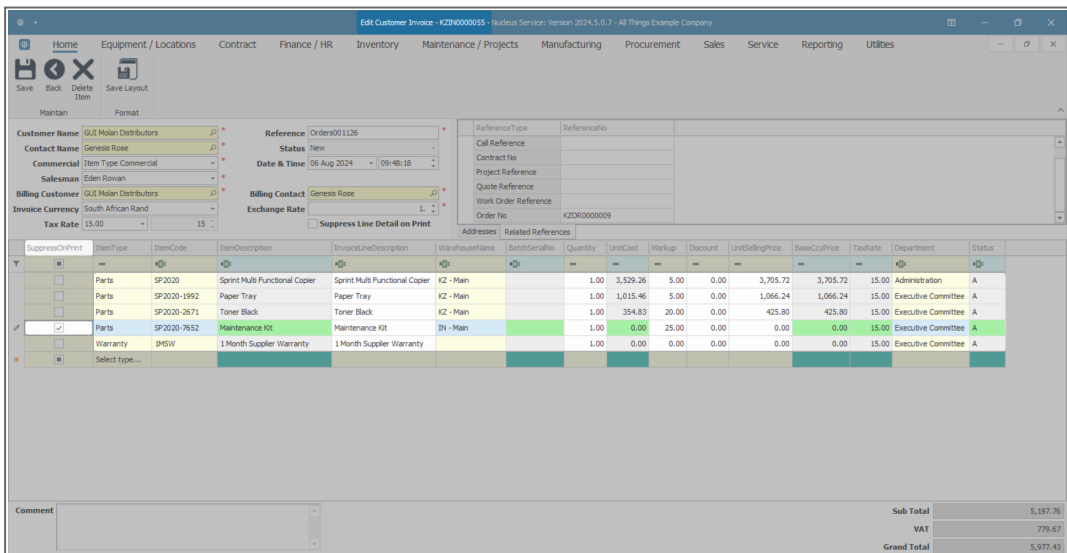


- When you receive the third **Invoice Generation** message to confirm -
 - Do you wish to view the Invoice created, no KZIN []?
 - Click on **Yes** to view the Invoice.
 - Click on **No** to return to the **Sales Orders** screen.
- The converted Sales Order can now be viewed from the [Sales Invoices listing screen](#).



VIEW THE CUSTOMER INVOICE

- If you have selected **Yes** to view the Invoice, then the **Edit Customer Invoice** screen will be displayed.
- Invoice Items and Item Details can be **Suppressed** or **Hidden** on a Sales Invoice, but you may not want to use this functionality.
- Please refer to [Suppress Details on Invoice](#) and [Suppress Line Detail on Print](#) for more details.
- **Drag and drop** items lines to set the order you wish the items to be displayed on the sales invoice.
- This order will be pulled into the printed invoice when generated.



- Make the changes that are required, then click on **Save**.



Note: You can only edit the invoice if it is still in the **New** status. In any other status, you will need to raise a credit note if a correction is required.

- You will return to the **Sales Orders** listing screen.
- The Sales Order that you converted into an Invoice can now be viewed from the **Invoiced Order** Status.
- Refer to [Sales Invoices listing screen](#) for further details on this topic.

OrderNo	CustomerCode	CustomerName	DeptCode	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	SalesmanName	BaseCurrencyTotal	Status	OrderStatus
KZOR000001	6039149112	MTR Penny Marketing	SALS	Sales	123456789	4,830.00	ZAR	1.00	15.00	12 Dec 2023	13:59:53	Eden Rowan	4,830.00	A	I
KZOR000002	6028143645	GLT Molan Distributors	SALS	Sales	MNU Invoicing	4,261.58	ZAR	1.00	15.00	26 Jul 2024	15:45:58	Cal Johns	4,261.58	A	I
KZOR000003	6099113735	DCT Pebble Marketing	SALS	Sales	AccountsPOMNU062	9,377.40	ZAR	1.00	15.00	30 Jul 2024	13:23:50	Brian Portillo	9,377.40	A	I
KZOR000004	6005715519	Carrie Oscar CC	SALS	Sales	MNU20201	6,222.63	ZAR	1.00	15.00	30 Jul 2024	14:06:26	Eden Rowan	6,222.63	A	I
KZOR000007	6075468708	MIRA Burhill CC	SALS	Sales	12600Order	9,588.93	ZAR	1.00	15.00	02 Aug 2024	11:23:49	Brian Portillo	9,588.93	A	I
KZOR000009	6028143645	GLT Molan Distributors	SALS	Sales	Orders01126	5,977.42	ZAR	1.00	15.00	02 Aug 2024	11:33:43	Eden Rowan	5,977.42	A	I
KZOR000011	6003911995	POMA Management	SALS	Sales	WOrders126000	6,286.25	ZAR	1.00	15.00	02 Aug 2024	11:36:31	Eden Rowan	6,286.25	A	I
KZOR000014	6015257191	Oranges Outer Analysis	SALS	Sales	SalesOrder026001	1,587.00	ZAR	1.00	15.00	02 Aug 2024	15:07:24	Brian Portillo	1,587.00	A	I
KZOR000016	6075468708	MIRA Burhill CC	SALS	Sales	Forward MNU126010	4,830.00	ZAR	1.00	15.00	05 Aug 2024	13:54:52	Eden Rowan	4,830.00	A	I
KZOR000017	6075468708	MIRA Burhill CC	SALS	Sales	SalesOrderForward	4,830.00	ZAR	1.00	15.00	05 Aug 2024	14:07:29	Eden Rowan	4,830.00	A	I
KZOR000018	6075468708	MIRA Burhill CC	SALS	Sales	MNU126010	4,830.00	ZAR	1.00	15.00	05 Aug 2024	14:11:19	Eden Rowan	4,830.00	A	I
KZOR000019	6015257191	Oranges Outer Analysis	SALS	Sales	Forward Navigation	483.00	ZAR	1.00	15.00	05 Aug 2024	14:17:53	Eden Rowan	483.00	A	I
KZOR000020	6015257191	Oranges Outer Analysis	SALS	Sales	MNU126010	1,173.00	ZAR	1.00	15.00	05 Aug 2024	14:20:44	Eden Rowan	1,173.00	A	I
KZOR000021	6005715519	Carrie Oscar CC	SALS	Sales	MNU126010	4,830.00	ZAR	1.00	15.00	05 Aug 2024	14:23:06	Brian Portillo	4,830.00	A	I

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](#)

MNU.126.005