

SALES

ORDERS - ADD ITEMS TO WORK ORDER

A quote may be created from a **project**, **call** or **work order**, where additional billable work is required.

The quote can be converted to a sales order, and parts required will automatically be added as part requests on the originating work order, when selecting '**Add Items to WO**'.

Ribbon Select Sales > Orders

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- The Sales Orders listing screen will be displayed.
- Select the **Site** where the Sales Order can be located.
 - The example has **KwaZulu-Natal** selected.
- The Status must be set to New Order.
- Select the **row** of the **sales order** for which you wish to **add items** to the work order.
- Click on Add Items to WO.

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



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- When you receive the Add Items to WO to confirm -
 - Are you sure you wish to add these order items to associated work order no. WO []?
- Click on Yes, if you are certain about your selection.

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 The Sales Order items have been added to the linked Work Order.

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)
- Create New Deal Project Sale / Rental

MNU.126.007