

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

| ۰ | Nucleus Service: Version 2024.5.0.7 - All Things Example Company | | | | | | | | | | | | | | ٥ | × |
|----------|--|-------------|---------------------|----------|--------------------------|---------------|-------------|-------|---------|-----------|-----------|--|--|--|---|---|
| ۲ | Equipment / Locatio | ns Contract | Finance / HR | Inventor | / Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | | | | |
| 104 | 8 🖻 | | | Ó | | | | | | | | | | | | |
| Customer | s Services Commercials | | ers Invoices Credit | | | | | | | | | | | | | |
| | Master | | Processing | | | | | | | | | | | | | ^ |

- 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.



| 4 | | | | | | | | Se | les Orders - Nucleu | | | | | | | | | | | | | | |
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| (| Home | Equipme | ent / Locat | tions (| Contract | Financ | ce / HR | Inventory | Maintenance | e / Projects | Manufa | icturing | Procure | ement | t Sales | Servi | ce Repor | ting Utilities | | | - | Ø | × |
| | dd Edit D | | ••••• | Create C Invoice Ne | Create ew Deal to | WO Proj | Deal Sav | re Layout Workspac | es Print Sales P Order | Print Proforma Expor | | w order | • • • • • • • • • • • • • • • • • • • | | | | | | | | | | |
| | Mainta | | Navigati | | Process | | | Format | | Print | | Currer | nt | | | | | | | | | | |
| | | er here to group I | | | | | | | | | | | | | | | | BaseCurrencyTotal | | | | | þ |
| Ŧ | | CustomerCode CustomerNam | | | | | ND: | | | | *[]c | y Exchange | = | | = | ADC | ND: | | | *Oc | *Dc | | |
| | KZOR0000005 | 6075468708 | MHRA Burh | MHRA Burhill CC | | LS | Sales | New order | OrderMNU126 | 4,830.00 | ZAR | | 1.00 | 15.00 | 30 Jul 2024 | 11:25:26 | Cory Griffin | 4,830.00 | N | A | | | |
| | KZOR0000006 | 6099963015 | Painter Bur | ghall Solution | ns SA | LS | Sales | New order | MNU126Orders | 4,226.25 | ZAR | | 1.00 | 15.00 | 05 Jul 2024 | 11:28:23 | Briana Acevedo | 4,226.25 | N | A | | | |
| | | 6000656152 | Gardening I | | | | Sales | New order | 126000WO | 5,313.00 | | | | | | | Briar Portillo | 5,313.00 | | A | | | |
| 1 | KZOR0000023 | All groups | | er Analysis | SA SA | LS | Sales | New order | SalesQuote WO | 5,071.50 | ZAR | | 1.00 | 15.00 | 06 Aug 2024 | 16:07:55 | Eden Rowan | 5,071.50 | N | A | | | |
| | | Haintenance ∴ Add Add Norder Set Order Set Order Deter Core Coar Fires Processing Processing Norder Norder Mark | | 1 | | | | | | | | | | | | | | | | | | | |

- 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.

| | Sales Orders - Nucleus Service: Version 2024.5.0.7 - All Things Example Company | | | | | | | | | | | | | | | | | | × | | | | | | | |
|------|---|---------------------|----------------------------------|-------------|----------------|--------------|-------------|----------------------------|---------------------|------------|-------------|---------------------------|-------------------------------------|----------|--------------------------|-----------------|--------------|-------------------------|-----------|----------------|------------------|---------------|--------|----------|---|---|
| E | 3 | Hon | ome Equipment / Locations Contra | | | | act F | ict Finance / HR Inventory | | | Maintenanc | Maintenance / Projects Ma | | | anufacturing Procurement | | | Sales Service Reporting | | | Utilities | | | 0 | × | |
| E | 3 | Children (Children) | X | 2 | Θ | | | 0 | Ð | Ð | | E. | | | vaZulu-Nat | sl Ia | 2 | | | | | | | | | |
| Ac | Ы | Edit | Delete | View | Forward | Create | | Add Items | New Deal Project | | t Workspace | es Print Sales Order | Print Proforma Invoice | _ | ew order | * | Refresh | | | | | | | | | |
| | | Main | intain Navigati Pr | | | | | ocess | | | | 0100 | Print | | | | | | | | | | | | | ^ |
| Drag | a col | umn he | ader he | re to group | p by that colu | mn | | | | | | | | | | | | | | | | | | | | Q |
| | Order | No | | stomerCod | le Customer | Name | | DeptCod | e DeptN | ame Orders | StatusDesc | OrderDescription | OrderVak | e Curren | cy Excha | igeRate | TaxRate | OrderDate | OrderTime | SalesmanName | BaseCurrencyTota | I OrderStatus | Status | Comments | | |
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| | KZOR | 000000 | 15 603 | 75468708 | MHRA Bu | hill CC | | SALS | Sales | New or | rder | OrderMNU 126 | 4,83 | 0.00 ZAR | | 1.00 | 15.00 | 0 30 Jul 2024 | 11:25:26 | Cory Griffin | 4,830.0 | 0 N | А | | | |
| | KZOR | 000000 | 609 | 99963015 | Painter Bu | urghall Solu | utions | SALS | Sales | New or | rder | MNU126Orders | 4,23 | 6.25 ZAR | | 1.00 | 15.00 | 05 Jul 2024 | 11:28:23 | Briana Aceved | o 4,226.3 | 15 N | A | | | |
| | KZOR | 000001 | 13 601 | 00656152 | Gardening | Pechold C | Dutsourcing | SALS | Sales | New or | rder | 12 Add Items 1 | to WO | | | | | × 2024 | 11:40:32 | Briar Portillo | 5,313.0 | 0 N | Α | | | |
| ÷. | KZOR | 000002 | 3 60 | 15257191 | Oranges | Outer Anal | lysis | SALS | Sales | New or | rder | Sa | | | | | | 203 | 16:07:55 | Eden Rowan | 5,071.5 | io n | A | | | |
| | | | | | | | | | | | | | re you sure you vork order no. H | | ? | er items Yes | to associate | | | | | | | | | |

 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