

SALES

ORDERS - VIEW SALES ORDER

Ribbon Select Sales > Orders

| ۰ ی | Nucleus Service: Version 2024.5.0.7 - All Things Example Company | | | | | | | | | | | | œ | - | ٥ | × |
|----------|--|----------------------|--------------|------------------|--------------------------|---------------|-------------|-------|---------|-----------|-----------|--|---|---|---|---|
| ۲ | Equipment / Locatio | ns Contract | Finance / HR | Inventory | / Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | | | | |
| PO4 | 😸 🝯 | | | 6 | | | | | | | | | | | | |
| Customer | s Services Commercials | POS Lite Quotes Orde | | Statement Run | | | | | | | | | | | | |
| | Master | | Processing | | | | | | | | | | | | | ^ |

- The **Sales Orders** listing screen will be displayed.
- The Sales Orders listing screen will be displayed.
- Ensure that the correct **Site** and **Status** have been selected.
 - The example has KwaZulu-Natal as the site and New
 Order as the status selected.
- Select the **row** of the Sales Order that you wish to view.
- Click on View.

| I | Hom | e Equipr | nent / Locations | Contract | Finance | HR Inventory | Maintenance | / Projects | Manu | ifacturing | Procurem | nent Sal | es Ser | vice Repo | rting Utilities | | | - 0 | × |
|---|-----------------|------------------|---------------------------|--------------|---------------------------------|--------------------|------------------|---------------------------|----------|-----------------|----------|-------------|-----------|----------------|--------------------|-------------------|--------|------------|----|
| ć | D 🕤 | X 🔊 | | | D Q | 9 | | - 1 | | (waZulu-Natal - | • | | | | | | | | |
| 4 | Add Edit I | Delete View | Forward Create Invoice | Create Ad | d Items New Dea o WO Project | | | int Proforma E Invoice | | New order | Refresh | | | | | | | | |
| | Maint | ain | Navigati | Proces | 55 | Format | | Print | | Current | | | | | | | | | |
| | ag a column hea | der here to grou | p by that column | | | | | | | | | | | | | | | | ۶ |
| | OrderNo 🔻 | CustomerCode | CustomerName | Dep | tCode DeptN | me OrderStatusDesc | OrderDescription | OrderValue | Currency | ExchangeRate | TaxRate | OrderDate | OrderTime | SalesmanName | Comments | BaseCurrencyTotal | Status | OrderState | JS |
| T | ∎∐c | a∏c | 4[]c | ∎∐c | ∎∏c | 4[]C | a 🛛 c | - | a∏c | - | - | - | n 🗌 c | ∎∏c | #[]C | - | n]]c | A[]C | |
| | KZOR0000014 | 4 6015257191 | Oranges Outer Analysi | s SAL | S Sales | New order | SalesOrder02600 | 1,587.00 | ZAR | 1.00 | 15.00 | 02 Aug 2024 | 15:07:24 | Briar Portillo | Call to confirm or | 1,587.00 | Α | N | |
| | KZOR0000013 | 6000656152 | Gardening Pechold Out | sourcing SAL | S Sales | New order | 126000WO | 5,313.00 | ZAR | 1.00 | 15.00 | 11 Jul 2024 | 11:40:32 | Briar Portillo | | 5,313.00 | A | N | |
| | KZOR0000012 | 2 6005715519 | Cairns Oscroft CC | SAL | S Sales | New order | 126000 | 4,830.00 | ZAR | 1.00 | 15.00 | 25 Jul 2024 | 11:39:31 | Eden Rowan | | 4,830.00 | Α | N | |
| ۲ | KZOR0000011 | 1 6003931995 | FDMA Management | SAL | S Sales | New order | WOrders 126000 | 6,296.25 | ZAR | 1.00 | 15.00 | 02 Aug 2024 | 11:36:31 | Eden Rowan | Orders MNU000126 | 6,296.25 | A | N | |
| | KZOR0000010 | 6005715519 | Cairns Oscroft CC | SAL | S Sales | New order | WO126000Orders | 5,313.00 | ZAR | 1.00 | 15.00 | 02 Aug 2024 | 11:34:36 | Eden Rowan | | 5,313.00 | Α | N | |
| | KZOR000009 | 9 6028143645 | GUI Molan Distributors | SAL | S Sales | New order | Orders001126 | 1,114.35 | ZAR | 1.00 | 15.00 | 02 Aug 2024 | 11:33:43 | Eden Rowan | | 1,114.35 | A | N | |
| | KZOR000008 | 6005715519 | Cairns Oscroft CC | SAL | S Sales | New order | Orders126 | 1,794.00 | ZAR | 1.00 | 15.00 | 01 Aug 2024 | 11:31:39 | Briar Portillo | | 1,794.00 | Α | N | |
| | KZOR000007 | 6075468708 | MHRA Burhill CC | SAL | S Sales | New order | 126000Order | 4,588.50 | ZAR | 1.00 | 15.00 | 02 Aug 2024 | 11:23:49 | Briar Portillo | Part Request. | 4,588.50 | A | N | |
| | KZOR000000 | 5 6099963015 | Painter Burghall Solution | ns SAL | S Sales | New order | MNU 126Orders | 4,226.25 | ZAR | 1.00 | 15.00 | 05 Jul 2024 | 11:28:23 | Briana Acevedo | | 4,226.25 | A | N | |
| | K70P000009 | 5 6075468708 | MHRA Burhill CC | SAL | S Sales | New order | OrderMNU126 | 4.830.00 | 740 | 1.00 | 15.00 | 30 Jul 2024 | 11/25/26 | Corv Griffin | | 4.830.00 | | N | |

• The View Customer Order - KZOR [] screen will display.

This is a **View only** screen and you will not be able to make changes to any of the customer details, billing details, related references or the item details for this sales order.

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



- You can however <u>Print a Sales Order</u> or <u>Print, Email a Proforma</u> <u>Invoice</u> from this screen.
- Click on **Back** to return to the Sales Orders listing screen.

| | | | | _ | | | | mer Order - KZOR0000 | | | | | | | | | | ⊞ - | _ | כ |
|-----------|-------------|------------------------------|----------------|------------------|---------------------------|------------|-----------------------------------|----------------------|--------------|----------------|----------|------------------|--------|----------|--------------------|--------------|-----------------------|--------------------|-----|-------|
| 3 | Home | | ent / Locatio | ins Con | tract Finar | ICE / HF | R Inventory | Maintenance | e / Projects | Manufactur | ing P | rocureme | nt Sal | es Se | rvice Rep | porting UI | tilities | | | Ø |
| 3 | | | | | | | | | | | | | | | | | | | | |
| dk : | Save Layout | t Print Sales Order | s Print Profor | ma | | | | | | | | | | | | | | | | |
| nt | Format | | Print | | | | | | | | | | | | | | | | | |
| Custon | ner Name | FDMA Manage | ement | • | Refere | nce W0 | Orders 126000 | • | | | | | | | | | Billing ad | ddress | | |
| | | Albert Beasle | :y | • | | ntus N | | | | | | | | | | | PO Box 0 Orthotric | | Ŀ | |
| | mmercial | | | · • | Order Date & T | ime 02 | Aug 2024 * 1 | 1:36:31 | | | | | | | | | Macaskil | Forest | • | |
| | | Eden Rowan | | | | | | | | | | | | | | | Shipping 769 Hope | address | ŀ | |
| - | | FDMA Manage South African | | | Billing Con Exchange F | | bert Beasley | 1.0 | | | | | | | | | Orthotric | h Building | | |
| | Tax Rate | | T KOTO | 15.00 | Excitatinge P | ate | | A | | | | | | | | | | Related Reference | | |
| Suppres | ssOnPrint | ItemType | ItemCode | ItemDescription | _ | OrderLin | eDescription | WarehouseName | Quantity | QuantityPerUOP | UnitType | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcvPrice | | Department | | tatus |
| | | | | a[]c | | a∏c | | *[]c | = | = | #[]C | - | = | - | = | = | = | *[]c | | 00 |
| []c | | #∐c | #[]C | | | | | | | | | | | | | | | | | |
| l∏c No | | - | INST | Installation Fee | | Installati | ion Fee | | 1.00 | 0.00 | | 0.00 | 0.00 | 0.00 | 1,275.0 | 0 1,275.00 | 15.00 | Executive Committe | e 4 | |
| | | SERV | | | | Installati | ion Fee ulti Functional Copier | KZ - Main | 1.00 | 0.00 | | 0.00 3,515.92 | | 0.00 | 1,275.0 4,200.0 | | | Executive Committe | | |
| lo | | SERV | INST | Installation Fee | | Installati | | | | | | | | | | | | | | |

FORWARD NAVIGATION BUTTON

The **Forward navigation** button is only available in the **Invoiced Order** status. This feature enables the user to quickly find the related documentation by navigating to any downstream process documents related to the selected order e.g. the linked Sales Invoice or the related new deal Call or Project.

- In the Sales Orders listing screen,
- Ensure that you have selected the correct **Site**.
- Change the **Status** to **Invoiced order**.
- Select the row of the Invoiced Order that you wish to view.
- Click on Forward.



| 8 | B Home | e Equipme | ent / Locations | Contract | Finance / H | IR Inventory | Maintenance | / Projects | Manufa | cturing Pi | rocuremen | t Sales | Service | e Reporting |) Utilities | - 0 | × |
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| E Ad | | X S View | Forward | 88 C |) Q | Save Layout Works | | | | aZulu-Natal + | e fresh | | | | | | |
| | Maintai | in | Navigati | Process | | Format | | Print | | Current | | | | | | | |
| braç | g a column head | der here to group l | by that column | | | | | | | | | | | | | | |
| | OrderNo | CustomerCode | CustomerName | DeptCode | DeptName | OrderStatusDesc | OrderDescription | OrderValue | Currency | ExchangeRate | TaxRate | OrderDate | OrderTime | SalesmanName | Comments | BaseCurrencyTotal | Statu |
| Ŧ | ∎C . | a∏c | a∏c | #[]c | #∐c | a∏c | ∎∐c | - | s∐c | - | - | - | ∎∐c | ¥∐c | a∏c | - | ∎∐c |
| | KZOR000001 | 6039149112 | MTTR Penny Marketin | g SALS | Sales | Invoiced order | 123456789 | 4,830.0 | ZAR | 1.00 | 15.00 | 12 Dec 2023 | 13:59:53 | Eden Rowan | | 4,830.00 | A |
| | KZOR000002 | 6028143645 | GUI Molan Distributor | s SALS | Sales | Invoiced order | MNU Invoicing | 4,261.5 | ZAR | 1.00 | 15.00 | 26 Jul 2024 | 15:45:58 | Cal Johns | | 4,261.58 | B A |
| | KZOR000003 | | DCT Pebble Marketing | SALS | Sales | Invoiced order | Accounts8POMNU062 | 9,377.4 | ZAR | 1.00 | 15.00 | 30 Jul 2024 | 13:23:50 | Briar Portillo | | 9,377.40 | A |
| | KZOR0000004 | | Cairns Oscroft CC | SALS | Sales | Invoiced order | MNU062001 | 6,222.63 | | 1.00 | | | 14:06:26 | Eden Rowan | Quotation MNU062001 - Edited. | 6,222.63 | |
| _ | KZOR0000011 | | FDMA Management | SALS | Sales | Invoiced order | WOrders 126000 | 6,296.2 | | 1.00 | | 02 Aug 2024 | | Eden Rowan | Orders MNU000126 | 6,296.25 | |
| _ | KZOR0000014 | | Oranges Outer Analy | | Sales | Invoiced order | SalesOrder026001 | 1,587.00 | | 1.00 | | 02 Aug 2024 | | Briar Portillo | Call to confirm order. | 1,587.00 | |
| | KZOR0000016 | | MHRA Burhill CC | SALS | Sales | Invoiced order | Forward MNU126010 | 4,830.00 | | 1.00 | | 05 Aug 2024 | | Eden Rowan | MNU126010. | 4,830.00 | |
| | KZOR0000017 | 6075468708 | MHRA Burhill CC | SALS | Sales | Invoiced order | SalesOrderForward | 4,830.00 | ZAR | 1.00 | 15.00 | 05 Aug 2024 | 14:07:29 | Eden Rowan | | 4,830.00 | A |
| | KZOR0000018 | | MHRA Burhill CC | SALS | Sales | Invoiced order | MNu126010 | 4,830.00 | | 1.00 | | 05 Aug 2024 | | Eden Rowan | Forward Navigation | 4,830.00 | |
| | KZOR0000019 | 6015257191 | Oranges Outer Analy | sis SALS | Sales | Invoiced order | Forward Navigation | 483.00 | ZAR | 1.00 | 15.00 | 05 Aug 2024 | 14:17:53 | Eden Rowan | MNU126010 | 483.00 | A |
| | KZOR0000020 | | Oranges Outer Analy | | Sales | Invoiced order | MNU126010 | 1,173.0 | | 1.00 | | 05 Aug 2024 | | Eden Rowan | | 1,173.00 | |
| | KZOR0000021 | 6005715519 | Cairns Oscroft CC | SALS | Sales | Invoiced order | MNU126010 | 4.830.00 | ZAR | 1.00 | 15.00 | 05 Aug 2024 | 14:23:06 | Briar Portilo | | 4.830.00 | A |

• The Edit project : PRJ [] screen will open as the selected Sales Order is linked to a Project.

The down navigation will view a New Deal Call screen or the View Order screen, if the Sales Order is linked to one of those.

• Click on **Back** to return to the Sales Quotes listing screen.

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| B Home Equ | ipment / Locations Cont | ract Finance / HR | Inventory ! | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | - 0 | × |
| HOM | == | | | | | | | | | | | | |
| Save Back Save Layout | Workspaces | | | | | | | | | | | | |
| Process Fo | rmat | | | | | | | | | | | | ^ |
| Links = | Identification : | | | | Customer Inf | o | ÷ | Linked V | Vork Order | S | | | , Add |
| Enter text to search P | Description SalesO | rder 1260 10 🔺 | • | | | | | WOCode | Description | | SiteName | WOType | Additional Data |
| Functions | | | | | Customer Code | 6015257191 | | KW000000 | 165 SalesOrder12 | 010 Forward Navigation | KwaZulu-Nata | I NDS | Data |
| Work Orders | Project Reference PRJ000 | 00011 | | | | 445 151 8363 | | | | | | | |
| Work Urders | Project Type Unique | * | • | | Account Code | | Is Debtor | | | | | | |
| | Parent Project Details : | | | | Customer Status Contact No. | Active | Is Debtor | | | | | | |
| Work In Progress | Description | | | | | 46005328498 | | | | | | | |
| | Project Reference | | | | Hold Reason | | | | | | | | |
| Documents | Customer Orange | es Outer Analysis ,P | | | | | | | | | | | |
| | Schedule : | | | | Notes | | NoteDate | | | | | | |
| Notes | Status Open | | | | Ψ i⊡c | | - | | | | | | |
| | Start Date 05 Aug | 2024 - | | | | | | | | | | | |
| Assignment History | End Date 12 Aug | 2024 ~ | | | | | | | | | | | |
| Assignment motor y | Project Manager Eden R | owan + | • | | | | | | | | | | |
| | Notifiable | | | | | | | | | | | | |
| Progress Chart | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Baseline | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Contacts | | | | | | | | | | | | | |
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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.126.010