

We are currently updating our site; thank you for your patience.

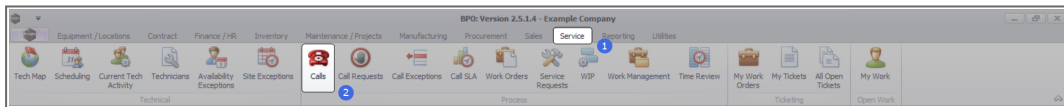
SERVICE

CALLS – SALES ORDER

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

After a quote for additional work on a call has been **approved** by the client - this quote will need to be converted to a **Sales Order** to start the procurement process for the parts or services.

Ribbon Select **Service** > **Calls**



- The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher

| CallReference | CustomerName | CallDate | CallState | Technician | CallTime | Description | CallType | CallTypeDesc | Error Code | Error Code Desc | SerialNo | ChkLocationSubject | Priority |
|---------------|----------------------|------------|---------------------|-----------------|----------|---|----------|-----------------------|------------|-----------------|-------------|---------------------------|----------|
| EN000103 | Young Electric | 13/12/2022 | Awaiting Acceptance | Ash Hilson | 09:09:10 | Test account balances | CR | Change Request | | | 107 | | 3 |
| EN000102 | Salemtek Driver | 12/12/2022 | Awaiting Acceptance | Mary Thompson | 06:18:30 | Test call for account balances manual. | SR | Select Call Type | | | 107 | | 3 |
| EN000101 | Young Electric | 20/11/2022 | Unassigned | | 11:29:19 | Order the same part twice receive with different batch num. | CR | Change Request | | | 107 | | 3 |
| EN000096 | Hope Works (Pty) Ltd | 24/10/2022 | Unassigned | | 13:11:11 | Printer/Barcode | IGR | New Deal Rental | | | | | 3 |
| EN000092 | Top Vehicle Hire | 20/10/2022 | Awaiting Acceptance | Daniel Belgoven | 14:55:17 | Loan machine for temporary high volume printing requirement | SERV | Service | | | TOP1234567 | | 3 |
| EN000091 | Asda Java Inc | 24/10/2022 | Unassigned | | 06:58:15 | Contact Closure - C0000054 | SR | Select Call Type | | | | | 3 |
| EN000089 | Deton / Technologies | 13/04/2022 | Unassigned | | 09:00:00 | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | 3 |
| EN000088 | Young Electric | 03/06/2022 | Unassigned | | 06:00:00 | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | 107 | | 3 |
| EN000087 | Young Electric | 06/06/2022 | Unassigned | | 06:00:00 | Call logged 4 days ago for elapse time checks | UPG | Upgrade | | | 107 | | 3 |
| EN000086 | Young Electric | 07/06/2022 | Unassigned | | 06:00:00 | Call logged 5 days ago for elapse time checks | SR | Select Call Type | | | 107 | | 3 |
| EN000085 | Hope Works (Pty) Ltd | 06/06/2022 | Unassigned | | 06:00:00 | Test future call - for elapsed time | UPG | Upgrade | | | 20-46765 | | 3 |
| EN000084 | Hope Works (Pty) Ltd | 06/06/2022 | Unassigned | | 06:00:00 | Test elapsed hours - 2 days prior | TEST | Testing | | | AT200000 | | 3 |
| EN000083 | Hope Works (Pty) Ltd | 06/06/2022 | Unassigned | | 06:00:00 | Test elapsed time 2 - day error | TEST | Testing | | | SN234123456 | | 3 |
| EN000082 | Young Electric | 18/06/2022 | Unassigned | | 06:00:00 | Test elapsed hours 1 | TEST | Testing | | | 107 | | 3 |
| EN000080 | Young Electric | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit | 11:24:28 | Test with our manager email entered | ADM | Administration | | | 107 | | 3 |
| EN000078 | Hope Works (Pty) Ltd | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit | 06:30:20 | test another call email | ADM | Administration | | | 09501015 | | 3 |
| EN000072 | Hope Works (Pty) Ltd | 18/11/2019 | Awaiting Acceptance | Bianca Du Toit | 15:07:00 | Test new call for email description in body | CR | Change Request | | | 09501015 | | 3 |
| EN000071 | Westwood Dynamic | 20/11/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000070 | Westwood Dynamic | 22/11/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000069 | Hope Works (Pty) Ltd | 16/11/2019 | Unassigned | | 08:00:00 | Tier - Commercial Tier Test | INAT | Installation | | | | Forest Hills Centre | 2 |
| EN000068 | Green Tea Supplies | 16/11/2019 | Unassigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |
| EN000067 | Westwood Dynamic | 15/11/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000066 | Westwood Dynamic | 08/11/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000065 | Westwood Dynamic | 02/11/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000064 | Red PC - IT Shop | 26/10/2019 | Unassigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | 147807 | | 2 |
| EN000063 | Westwood Dynamic | 20/10/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000062 | Hope Works (Pty) Ltd | 19/10/2019 | Unassigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | 18-30200 | | 2 |
| EN000061 | Hope Works (Pty) Ltd | 18/10/2019 | Unassigned | | 08:00:00 | Tier - Commercial Tier Test | INAT | Installation | | | | Forest Hills Centre | 2 |
| EN000060 | Westwood Dynamic | 18/10/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000059 | Westwood Dynamic | 11/10/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000058 | Westwood Dynamic | 04/10/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000057 | Westwood Dynamic | 27/09/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000056 | Westwood Dynamic | 20/09/2019 | Unassigned | | 08:00:00 | SubBtMant - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hiloest | 2 |
| EN000055 | Hope Works (Pty) Ltd | 18/09/2019 | Unassigned | | 08:00:00 | Tier - Commercial Tier Test | INAT | Installation | | | | Forest Hills Centre | 2 |
| EN000054 | Green Tea Supplies | 17/09/2019 | Unassigned | | 08:00:00 | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

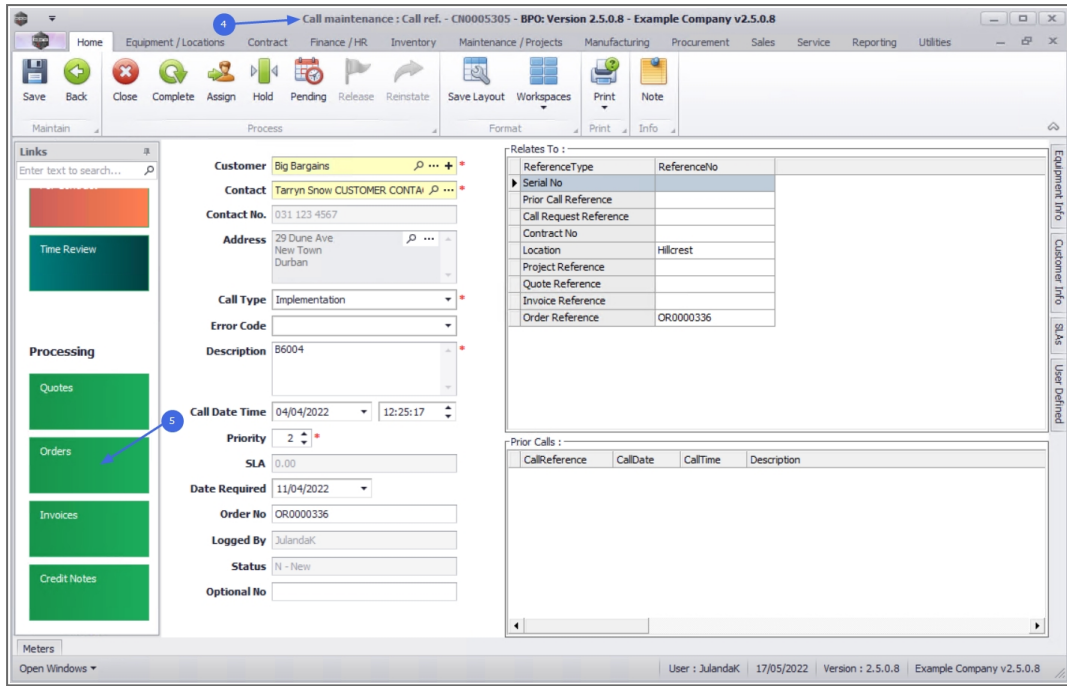
- Select the **Call** you wish to work with.

| CallRef | CustomerName | CallDate | CallTime | Technician | Description | CallType | CallDesc | ErrorCode | ErrorCodeDesc | SerialNo | ChkLocationSubject | Priority |
|-------------|-----------------------|------------|----------|--------------------------------------|---|----------|-----------------------|-----------|---------------|-------------|-----------------------------|----------|
| BN CH001003 | Young Electric | 12/12/2022 | 09:00:00 | Awaiting Acceptance - Ann Hilson | Test account balance | CR | Change Request | | | 107 | | 3 |
| BN CH001002 | Silverdale Drive | 12/12/2022 | 09:38:30 | Awaiting Acceptance - Nery Thompson | Test call for account balance manual | DR | Select Call Type | | | 92-12/1202 | | 3 |
| BN CH001001 | Young Electric | 29/11/2022 | 11:29:19 | Unassigned | Order the same part twice receive with different batch num. | CR | Change Request | | | an123 | | 3 |
| BN CH000992 | Top Vehicle Hire | 25/10/2022 | 14:58:17 | Awaiting Acceptance - Daniel Belgwen | Loan machine for temporary high volume printing requirement | SRV | Service | | | TOP123456 | | 3 |
| BN CH000991 | Apple Juice Inc | 24/10/2022 | 05:36:15 | Unassigned | Contact Closure - C0000055 | DR | Select Call Type | | | | | 3 |
| BN CH000989 | Derton / Technologies | 13/04/2022 | 09:00:00 | Unassigned | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | 3 |
| BN CH000988 | Young Electric | 12/06/2022 | 06:00:00 | Unassigned | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | | | 3 |
| BN CH000987 | Young Electric | 06/06/2022 | 06:00:00 | Unassigned | Call logged 4 days ago for elapse time checks | LPG | Upgrade | | | an123 | | 3 |
| BN CH000986 | Young Electric | 07/06/2022 | 06:00:00 | Unassigned | Call logged 3 days ago for elapse time checks | DR | Select Call Type | | | an123 | | 3 |
| BN CH000985 | Hope Works (Pty) Ltd | 18/06/2022 | 06:00:13 | Unassigned | Test future call - for elapsed time | LPG | Upgrade | | | 20-86765 | | 3 |
| BN CH000984 | Hope Works (Pty) Ltd | 08/06/2022 | 06:00:00 | Unassigned | Test elapsed hours - 2 day prior | TEST | Testing | | | AT000000 | | 3 |
| BN CH000983 | Hope Works (Pty) Ltd | 06/06/2022 | 06:00:13 | Unassigned | Test elapsed time 2 - day prior | TEST | Testing | | | SN234123456 | | 3 |
| BN CH000982 | Young Electric | 18/06/2022 | 06:00:35 | Unassigned | Test elapsed hours 1 | TEST | Testing | | | an123 | | 3 |
| BN CH000981 | Young Electric | 18/11/2019 | 13:24:29 | Awaiting Acceptance - Bianca Du Toit | Test with site manager email entered | ADM | Administration | | | 107 | | 3 |
| BN CH000978 | Hope Works (Pty) Ltd | 18/11/2019 | 06:30:28 | Awaiting Acceptance - Bianca Du Toit | Test another call email | ADM | Administration | | | 059319151 | | 3 |
| BN CH000977 | Westwood Dynamic | 29/11/2019 | 08:00:00 | Unassigned | Test new call for email description in body | CR | Change Request | | | 059319151 | | 3 |
| BN CH000971 | Westwood Dynamic | 29/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000970 | Westwood Dynamic | 22/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000969 | Hope Works (Pty) Ltd | 16/11/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000968 | Green Tea Supplies | 16/11/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |
| BN CH000967 | Westwood Dynamic | 15/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000966 | Westwood Dynamic | 08/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000965 | Westwood Dynamic | 02/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000964 | HOPE PC - IT Shop | 26/10/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | 147807 | | 2 |
| BN CH000963 | Westwood Dynamic | 25/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000962 | Hope Works (Pty) Ltd | 19/10/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | 18-30300 | | 2 |
| BN CH000961 | Hope Works (Pty) Ltd | 18/10/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000960 | Westwood Dynamic | 18/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000959 | Westwood Dynamic | 11/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000958 | Westwood Dynamic | 04/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000957 | Westwood Dynamic | 27/09/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000956 | Westwood Dynamic | 20/09/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000955 | Hope Works (Pty) Ltd | 16/09/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000954 | Green Tea Supplies | 17/08/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |

- Click on the **Edit** button.

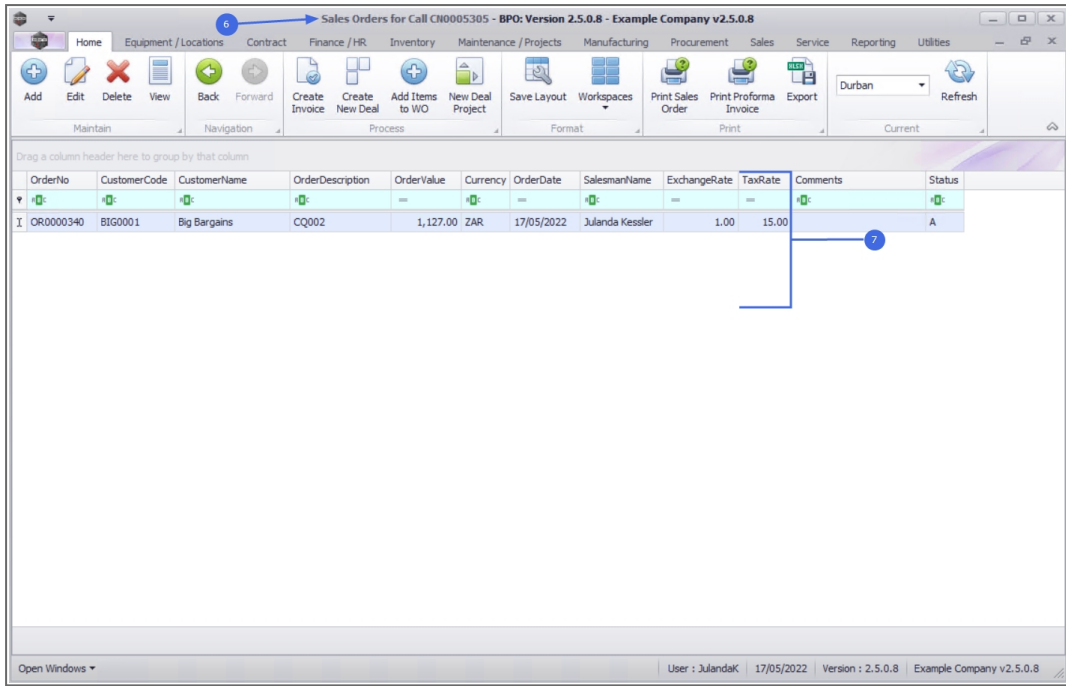
| CallRef | CustomerName | CallDate | CallTime | Technician | Description | CallType | CallDesc | ErrorCode | ErrorCodeDesc | SerialNo | ChkLocationSubject | Priority |
|-------------|-----------------------|------------|----------|--------------------------------------|---|----------|-----------------------|-----------|---------------|-------------|-----------------------------|----------|
| BN CH001003 | Young Electric | 12/12/2022 | 09:00:00 | Awaiting Acceptance - Ann Hilson | Test account balance | CR | Change Request | | | 107 | | 3 |
| BN CH001002 | Silverdale Drive | 12/12/2022 | 09:38:30 | Awaiting Acceptance - Nery Thompson | Test call for account balance manual | DR | Select Call Type | | | 92-12/1202 | | 3 |
| BN CH001001 | Young Electric | 29/11/2022 | 11:29:19 | Unassigned | Order the same part twice receive with different batch num. | CR | Change Request | | | an123 | | 3 |
| BN CH000992 | Top Vehicle Hire | 25/10/2022 | 14:58:17 | Awaiting Acceptance - Daniel Belgwen | Loan machine for temporary high volume printing requirement | SRV | Service | | | TOP123456 | | 3 |
| BN CH000991 | Apple Juice Inc | 24/10/2022 | 05:36:15 | Unassigned | Contact Closure - C0000055 | DR | Select Call Type | | | | | 3 |
| BN CH000989 | Derton / Technologies | 13/04/2022 | 09:00:00 | Unassigned | Call for Monday elapse hours check | TEST | Testing | | | 2020-2222 | | 3 |
| BN CH000988 | Young Electric | 12/06/2022 | 06:00:00 | Unassigned | Call logged 5 days ago for time elapsed checks | CR | Change Request | CONF | Configuration | | | 3 |
| BN CH000987 | Young Electric | 06/06/2022 | 06:00:00 | Unassigned | Call logged 4 days ago for elapse time checks | LPG | Upgrade | | | an123 | | 3 |
| BN CH000986 | Young Electric | 07/06/2022 | 06:00:00 | Unassigned | Call logged 3 days ago for elapse time checks | DR | Select Call Type | | | an123 | | 3 |
| BN CH000985 | Hope Works (Pty) Ltd | 18/06/2022 | 06:00:13 | Unassigned | Test future call - for elapsed time | LPG | Upgrade | | | 20-86765 | | 3 |
| BN CH000984 | Hope Works (Pty) Ltd | 08/06/2022 | 06:00:00 | Unassigned | Test elapsed hours - 2 day prior | TEST | Testing | | | AT000000 | | 3 |
| BN CH000983 | Hope Works (Pty) Ltd | 06/06/2022 | 06:00:13 | Unassigned | Test elapsed time 2 - day prior | TEST | Testing | | | SN234123456 | | 3 |
| BN CH000982 | Young Electric | 18/06/2022 | 06:00:35 | Unassigned | Test elapsed hours 1 | TEST | Testing | | | an123 | | 3 |
| BN CH000981 | Young Electric | 18/11/2019 | 13:24:29 | Awaiting Acceptance - Bianca Du Toit | Test with site manager email entered | ADM | Administration | | | 107 | | 3 |
| BN CH000978 | Hope Works (Pty) Ltd | 18/11/2019 | 06:30:28 | Awaiting Acceptance - Bianca Du Toit | Test another call email | ADM | Administration | | | 059319151 | | 3 |
| BN CH000977 | Westwood Dynamic | 29/11/2019 | 08:00:00 | Unassigned | Test new call for email description in body | CR | Change Request | | | 059319151 | | 3 |
| BN CH000971 | Westwood Dynamic | 29/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000970 | Westwood Dynamic | 22/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000969 | Hope Works (Pty) Ltd | 16/11/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000968 | Green Tea Supplies | 16/11/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |
| BN CH000967 | Westwood Dynamic | 15/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000966 | Westwood Dynamic | 08/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000965 | Westwood Dynamic | 02/11/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000964 | HOPE PC - IT Shop | 26/10/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | 147807 | | 2 |
| BN CH000963 | Westwood Dynamic | 25/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000962 | Hope Works (Pty) Ltd | 19/10/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | 18-30300 | | 2 |
| BN CH000961 | Hope Works (Pty) Ltd | 18/10/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000960 | Westwood Dynamic | 18/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000959 | Westwood Dynamic | 11/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000958 | Westwood Dynamic | 04/10/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000957 | Westwood Dynamic | 27/09/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000956 | Westwood Dynamic | 20/09/2019 | 08:00:00 | Unassigned | Subst/Maint - Bathroom Bin Maintenance | SM | Scheduled Maintenance | | | | Checkers Centre - Hilo-test | 2 |
| BN CH000955 | Hope Works (Pty) Ltd | 16/09/2019 | 08:00:00 | Unassigned | Tier - Commercial Tier Test | INVT | Installation | | | | Forest Hills Centre | 2 |
| BN CH000954 | Green Tea Supplies | 17/08/2019 | 08:00:00 | Unassigned | 2MS - 2 month service | SM | Scheduled Maintenance | | | NEW1234 | | 2 |

- The **Call maintenance : Call ref. - [call ref number]** screen will be displayed.
- Click on the **Orders** tile.



SALES ORDER LISTING

- The **Sales Quotes for Call** [call ref number] screen will be displayed.
- Any orders that have already been added for the call, will be listed on this screen.

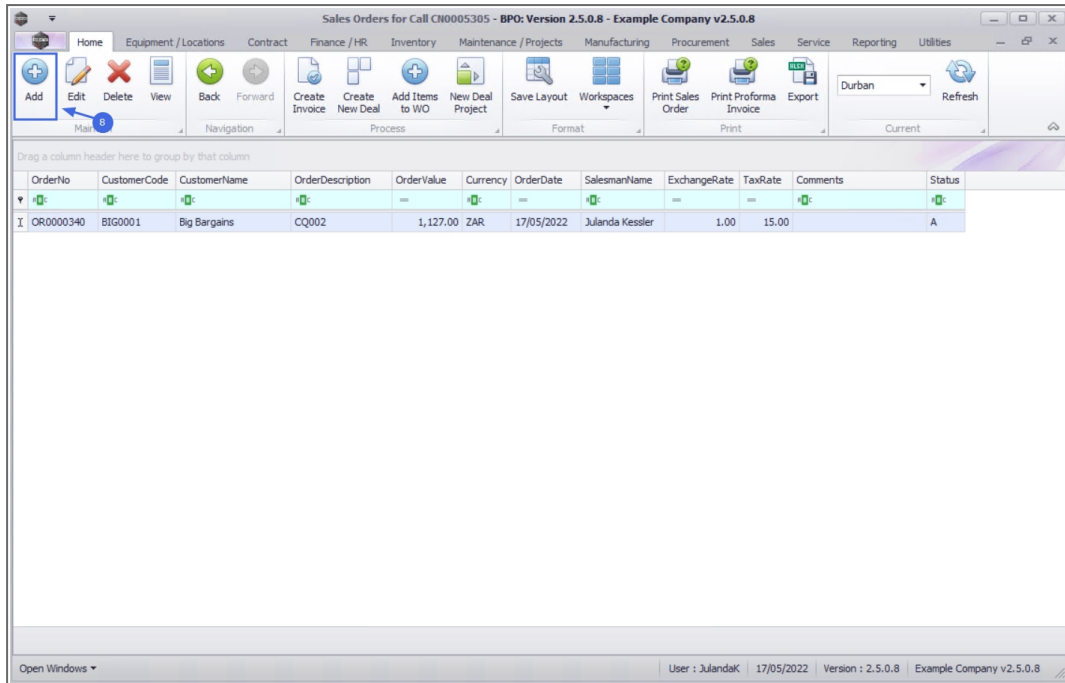


ADD SALES ORDER

- Click on **Add**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



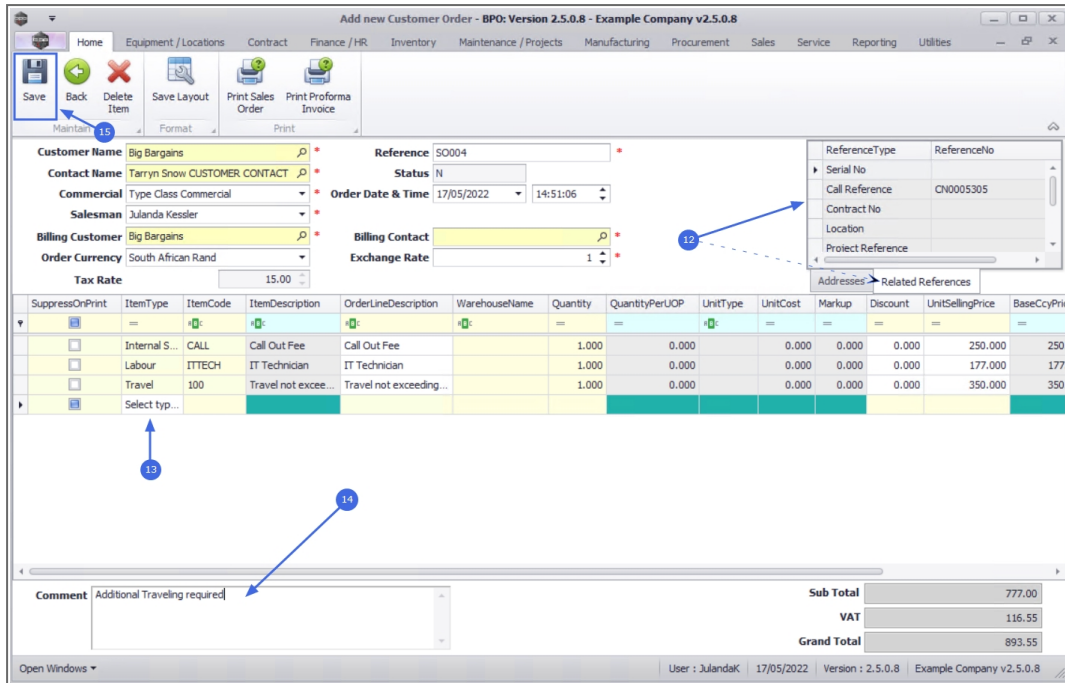
- "The Add new Customer Order screen will be displayed. " on page 2
- Complete the **Sales Order Header** and the **Financial Header** Information.
- Confirm the **Billing and Shipping Addresses** for the customer, if these fields were not auto populated when you entered the order header information.

RELATED REFERENCES

- Click on the **Related References** tab to link the reference information for the customer Order.

LINE ITEMS AND COMMENTS

- "**Add Sales Order Items**" on page 11 as required.
- Click in the **Comments text box** to type a comment related to the Order.
- Click on **Save** to save the customer Order.



- The **Sales Orders for Customer** listing screen will be updated with the new Order that you have created.

For a detailed handling of this topic refer to [Orders - Add Sales Order](#)

EDIT SALES ORDER

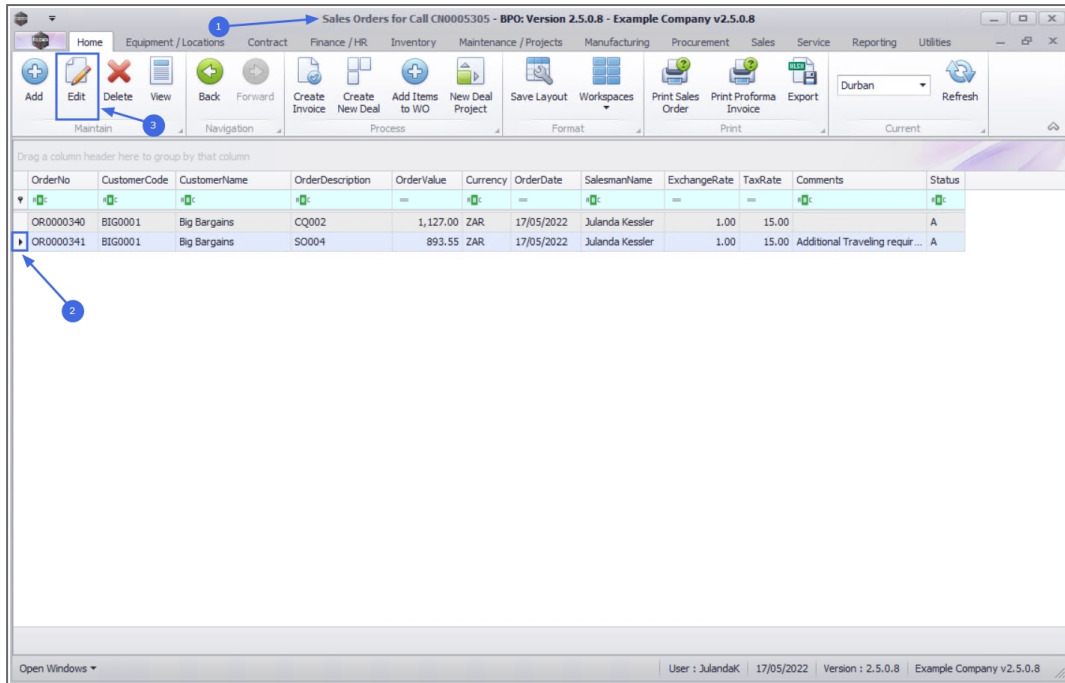


Sales Orders that have already been invoiced will **not** be available for editing.

- From the **Sales Orders for Call** [call ref number] screen,
- Click in the **row** of the Sales Order you wish to edit.
- Click on **Edit**.

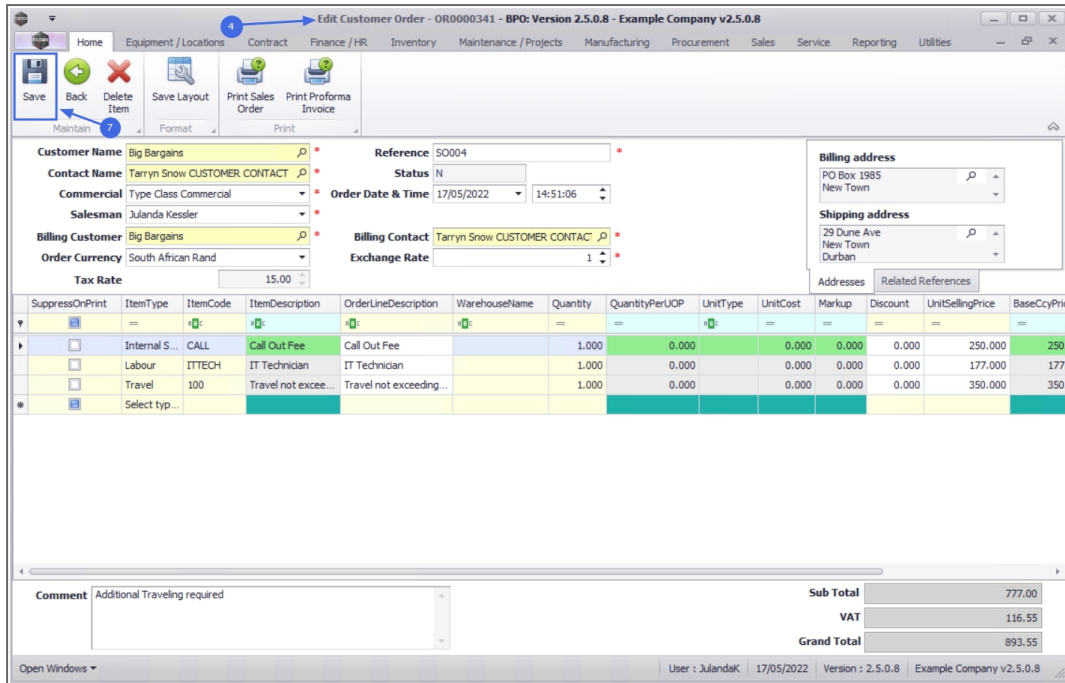


Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



- The **Edit Customer Order - [Order Number]** listing screen will display.
- Make the required changes to the **Heading Information**, **Addresses** or **Related References** tabs.
- Make the necessary changes to the Order Item frame:
 - To "**Add Sales Order Items**" on page 11, click in the Item Type column of the next available row.
 - To "**Delete Item line entry**" on page 8, click on the **row** of the item you wish to remove, then click on **Delete Item**.
- Click on **Save** to save the changes to the Customer Order and return to the **Sales Orders for Customer** screen.

For a detailed handling of this topic refer to [Orders - Edit Sales Order](#)



DELETE SALES ORDER



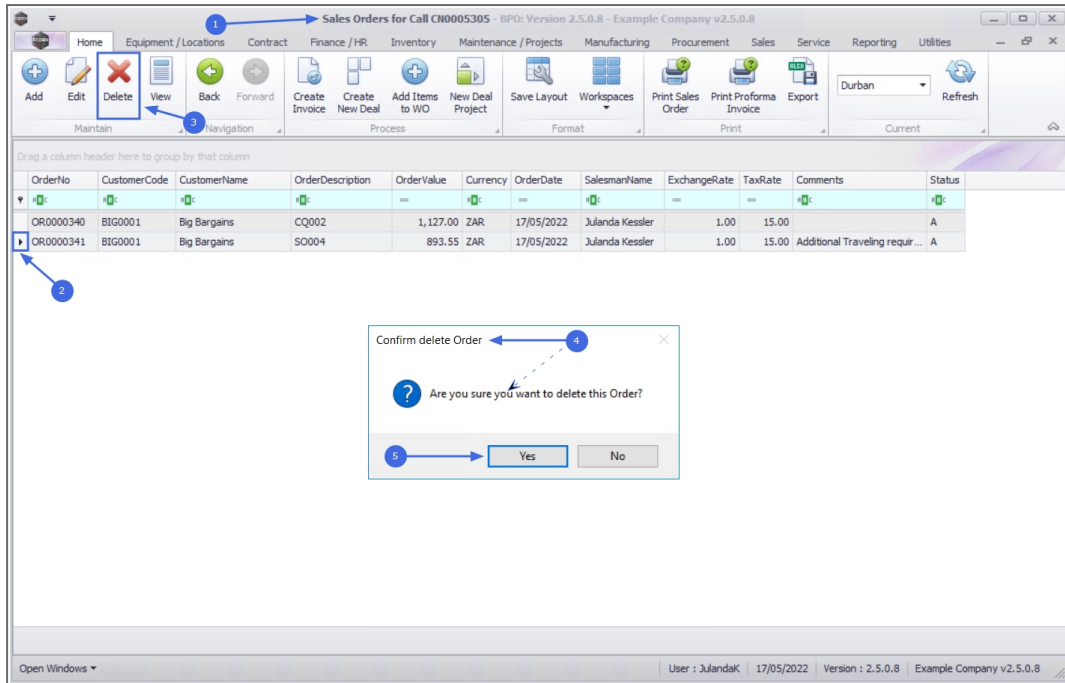
Orders that have already been invoiced will **not** be available for deletion.

- From the **Sales Orders for Call** [call ref number] screen,
- Click on to the **row** of the Sales Order you wish to **remove**.
- Click on **Delete**.



Short cut key: Right click to display the **All groups** menu list. Click on **Delete**.

- The **Confirm delete Order** message will display;
 - **Are you sure you want to delete this Order?**
- Click on **Yes**.



The Sales Order will be **removed** from the **Sales Orders for Customer** listing screen.



For a detailed handling of this topic refer to [Orders - Delete Sales Order](#)

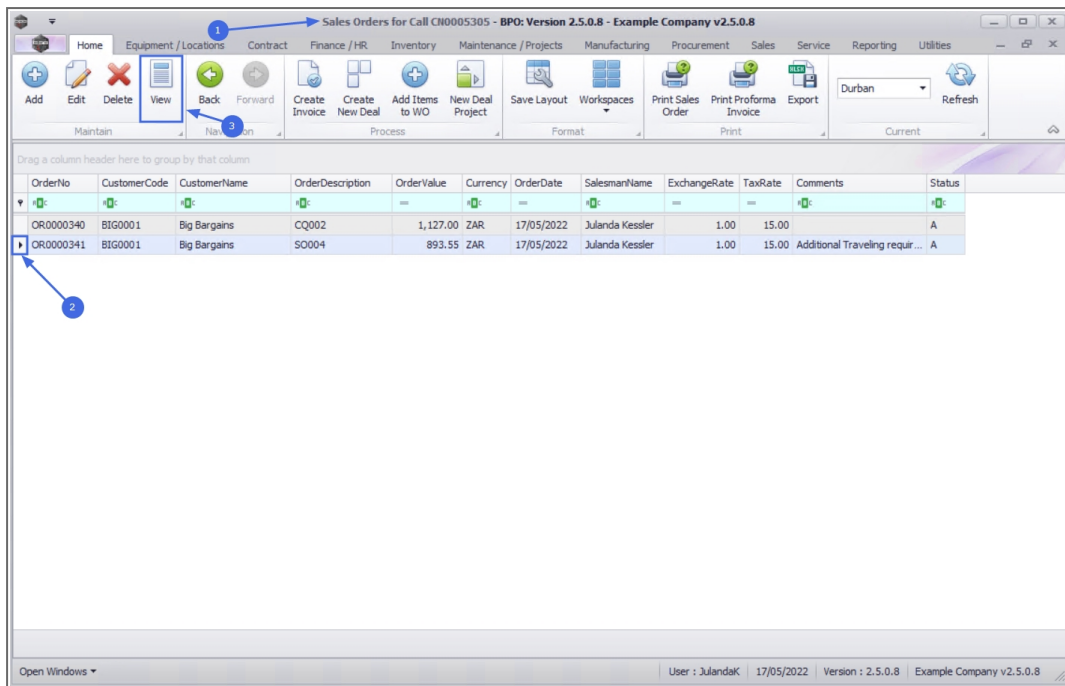
VIEW SALES ORDER

An Order can be viewed in **any** status.

- From the **Sales Orders for Call** [call ref number] screen,
- Click on the **row** of the Sales Order that you wish to **view**.
- Click on **View**.



Short cut key: Right click to display the **All groups** menu list. Click on **View**.



- The **View Customer Order - [Order Number]** screen will display.



No changes can be made to the information on the Order as this is a **view only** screen.

- You can **"Print Sales Order / Print Proforma Invoice"** on page 24 from this screen.
- Click **Back** to return to the **Sales Orders for Work Order** screen.

View Customer Order - OR0000341 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Customer Name: Big Bargains
 Contact Name: Tarryn Snow
 Commercial Type Class: ITTECH
 Salesman: Julanda K
 Billing Customer: Big Bargains
 Order Currency: South African Rand
 Tax Rate: 15.00%

Billing address: PO Box 1985, New Town
 Shipping address: 29 Dune Ave, New Town, Durban

| SuppressOnPrint | ItemType | ItemCode | ItemDescription | OrderLineDescription | WarehouseName | Quantity | QuantityPerUOP | UnitType | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPri |
|-----------------|----------|----------|---------------------|-------------------------|---------------|----------|----------------|----------|----------|--------|----------|------------------|------------|
| No | SERV | CALL | Call Out Fee | Call Out Fee | | 1.000 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 | 250.000 | 250 |
| No | CRFT | ITTECH | IT Technician | IT Technician | | 1.000 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 | 177.000 | 177 |
| No | TRVL | 100 | Travel not excee... | Travel not exceeding... | | 1.000 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 | 350.000 | 350 |

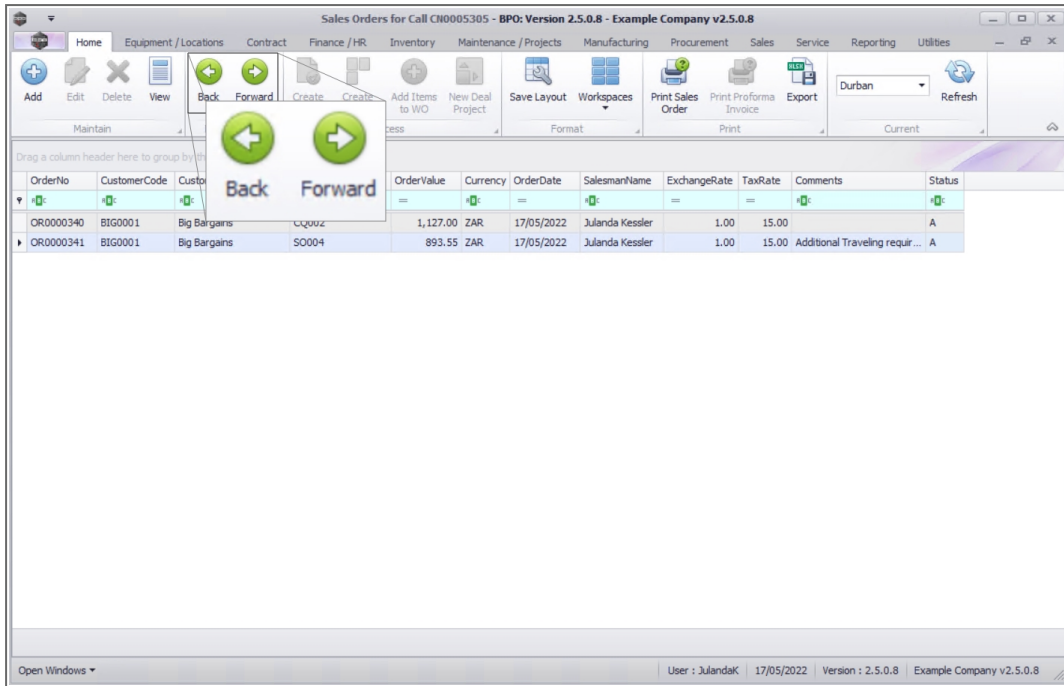
Comment: Additional Traveling required

Sub Total: 777.00
 VAT: 116.55
 Grand Total: 893.55

User: JulandaK | 17/05/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

NAVIGATION BUTTONS

- The **Forward** navigation button allows for quick navigation to related documentation, by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The **Back** navigation button will transport you back to the **Work Order Listing** screen.

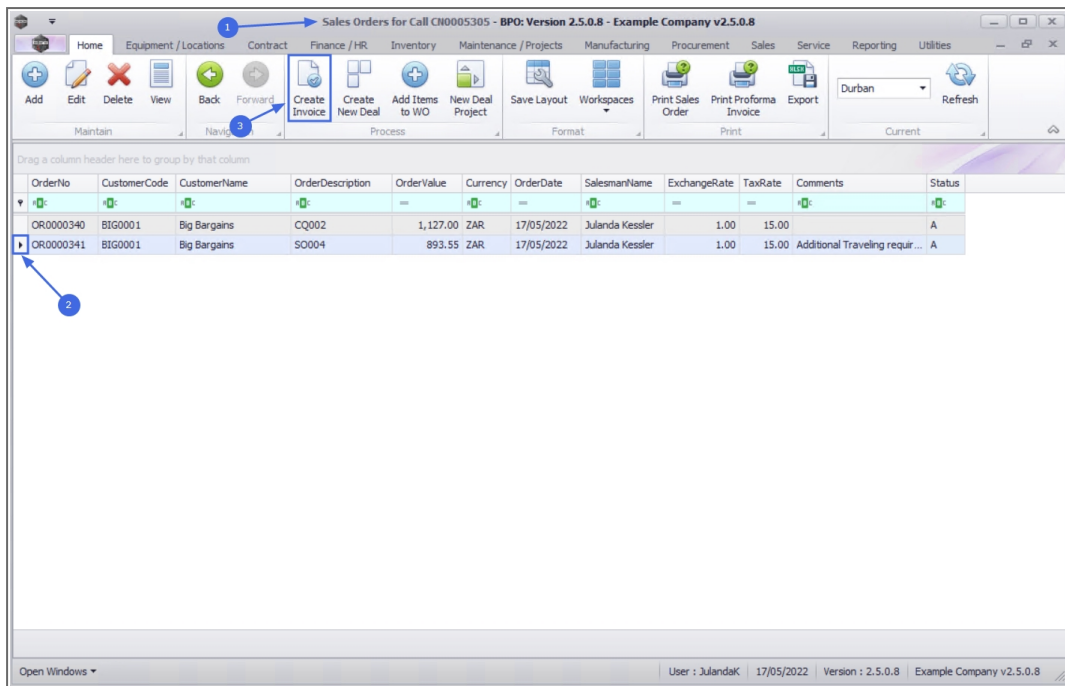


CREATE INVOICE

- From the **Sales Orders for Call** [call ref number] screen,
- Select the **row** of the Sales Order you wish to **create an invoice** for.
- Click on **Create Invoice**.

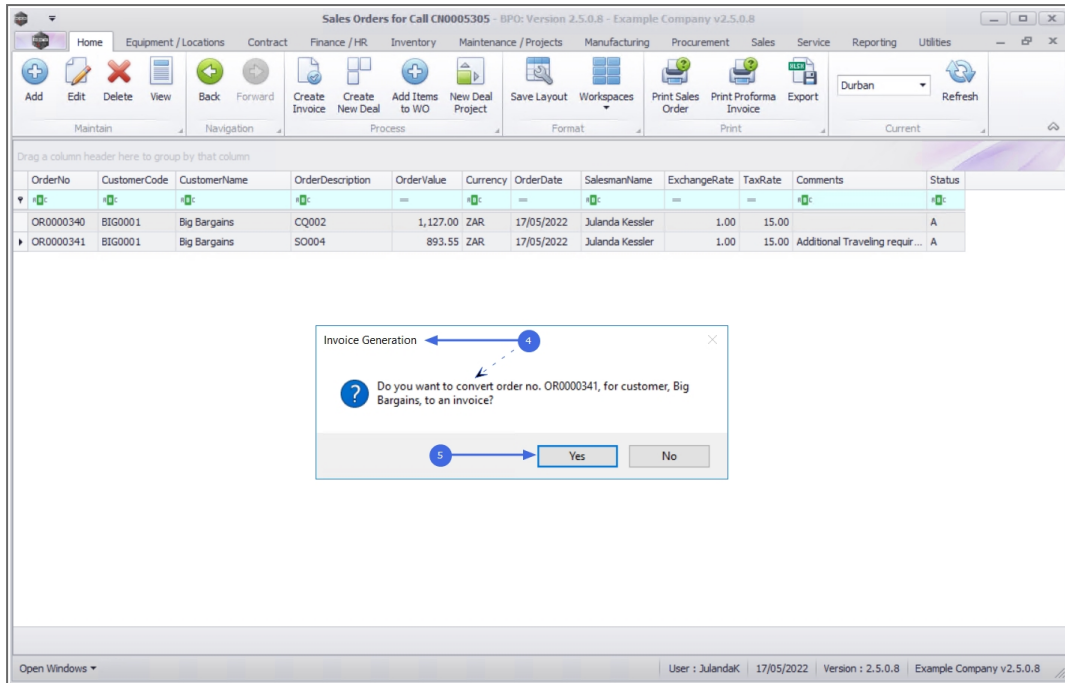


Short cut key: Right click to display the **All groups** menu list. Click on **Invoice**.

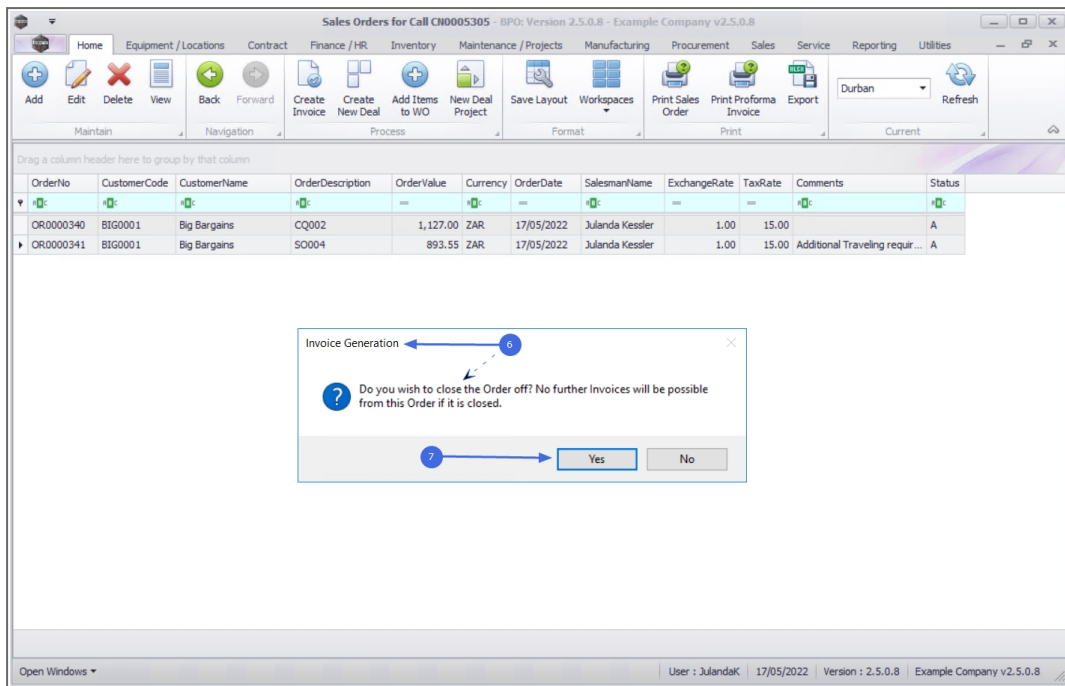


You will receive three (3) **Invoice Generation** messages:

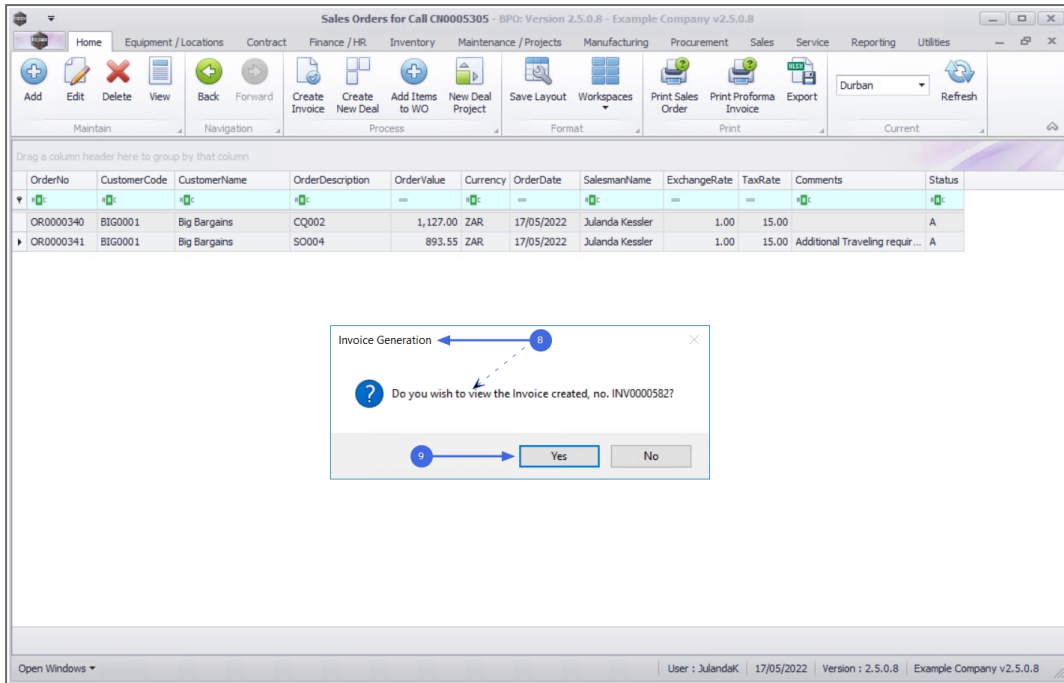
- The first **Invoice Generation** message will confirm;
 - **Do you want to convert order no. [order number], for customer, [customer code], to an invoice?**
- Click on **Yes**.



- The second **Invoice Generation** message will 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 [invoice number]?**
- Click on **Yes** to view the Invoice.
 - Click on **No** to return to the **Sales Orders for Customer** screen.



- The **Edit Customer Invoice** screen will display where you can view or make changes to the Invoice, if required.
- After making the necessary changes, click on **Save**.



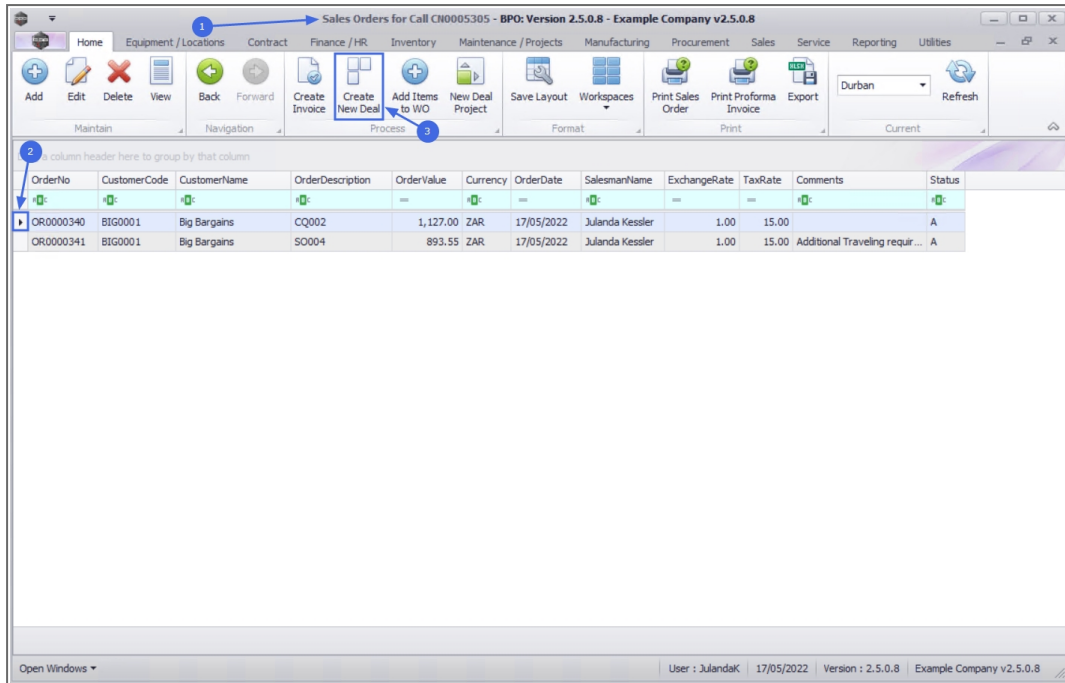
For a detailed handling of this topic refer to [Orders - Convert to Sales Invoice](#)

CREATE NEW DEAL

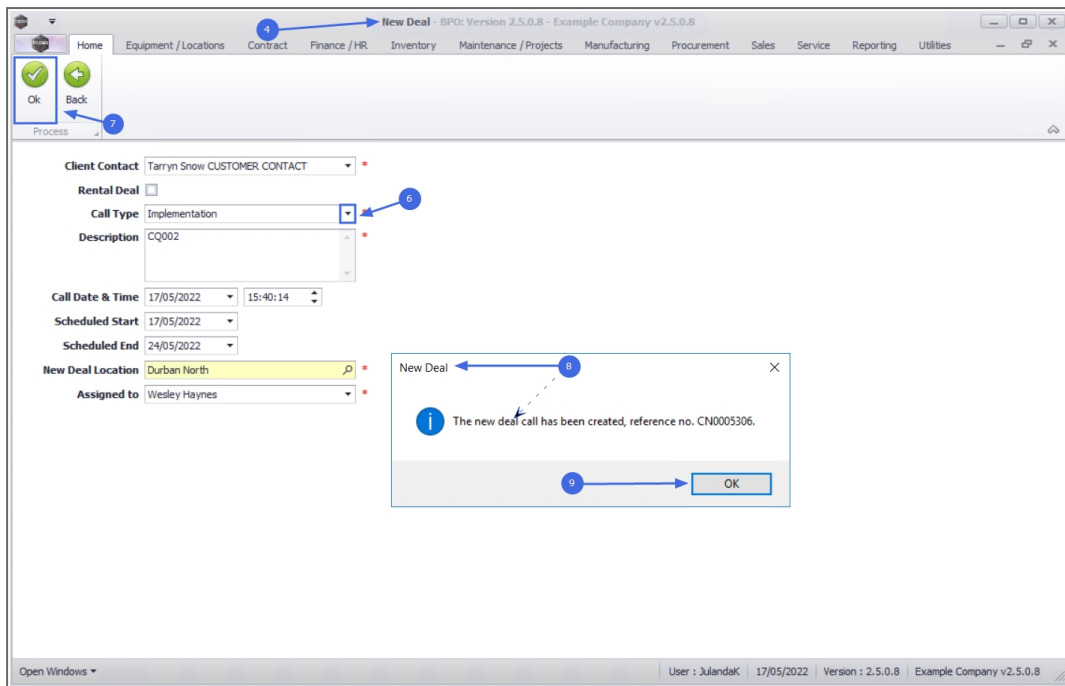
- From the **Sales Orders for Call** [call ref number] screen,
- Select the **row** of the Sales Order you wish to create a New Deal for.
- Click on **Create New Deal**.



Short cut key: Right click to display the **All groups** menu list. Click on **New Deal**.



- "The New Deal screen will be displayed." on page 3
- Complete the New Deal information as required.
- The **Call Type** field enables you to distinguish if this order is a [New Deal Sale](#) or [New Deal Rental](#).
- When you have completed the new deal information, click on **OK**.
- When you receive the **New Deal** message to confirm that;
 - **The new deal call has been created, reference no. [reference number]**
- Click on **OK**.



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



For a detailed handling of this topic refer to [Orders - Convert to New Deal Sale / Rental](#)

ADD ITEMS TO WORK ORDER

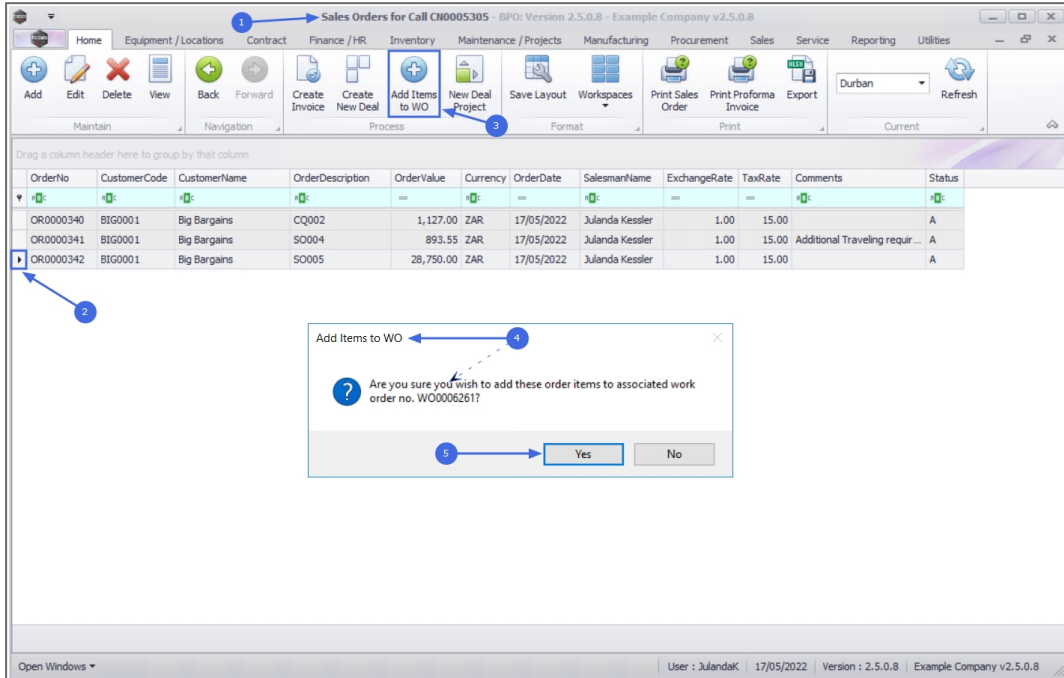
The Add Items to WO function is only valid where the Customer Order has been linked to an existing Work Order.

- From the **Sales Orders for Call [call ref number]** screen,
- Select the **row** of the Sales Order you wish to add items to.
- Click on **Add Items to WO**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add Items**.

- When you receive the **Add Items to WO** message to confirm;
 - **Are you sure you wish to add these order items to associated work order no [work order number]?**
- Click on **Yes**.



- You will return to the **Sales Orders for Work Order** screen.
- The Work Order items will have been added to the Sales Order.




For a detailed handling of this topic refer to [Orders - Add Items to Work Order](#)

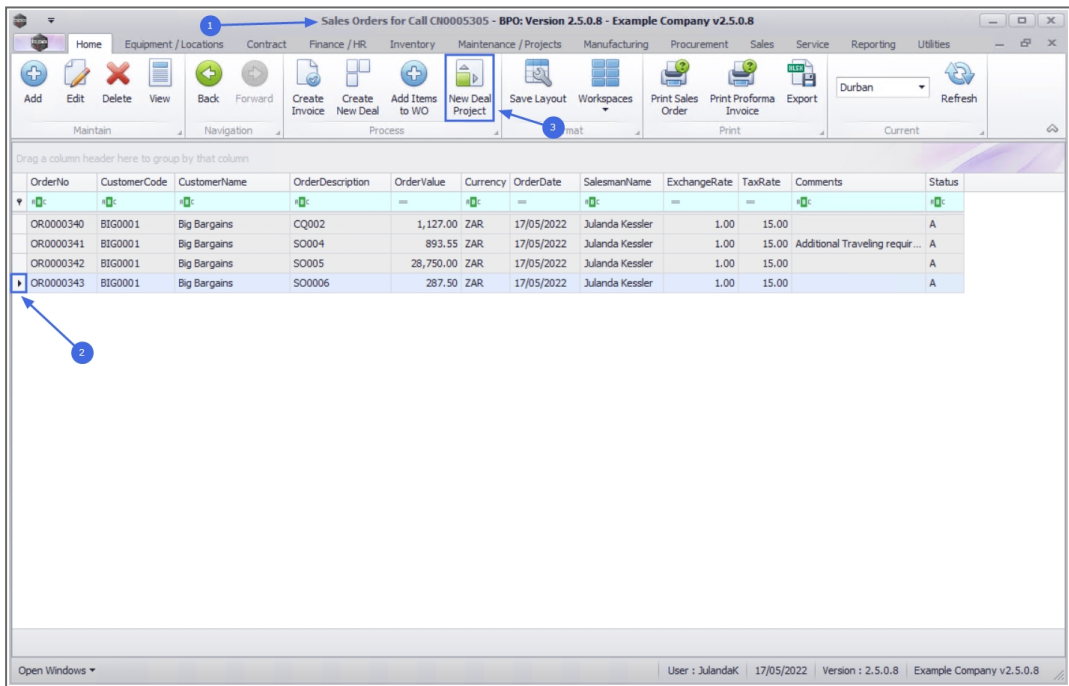
NEW DEAL PROJECT

- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.

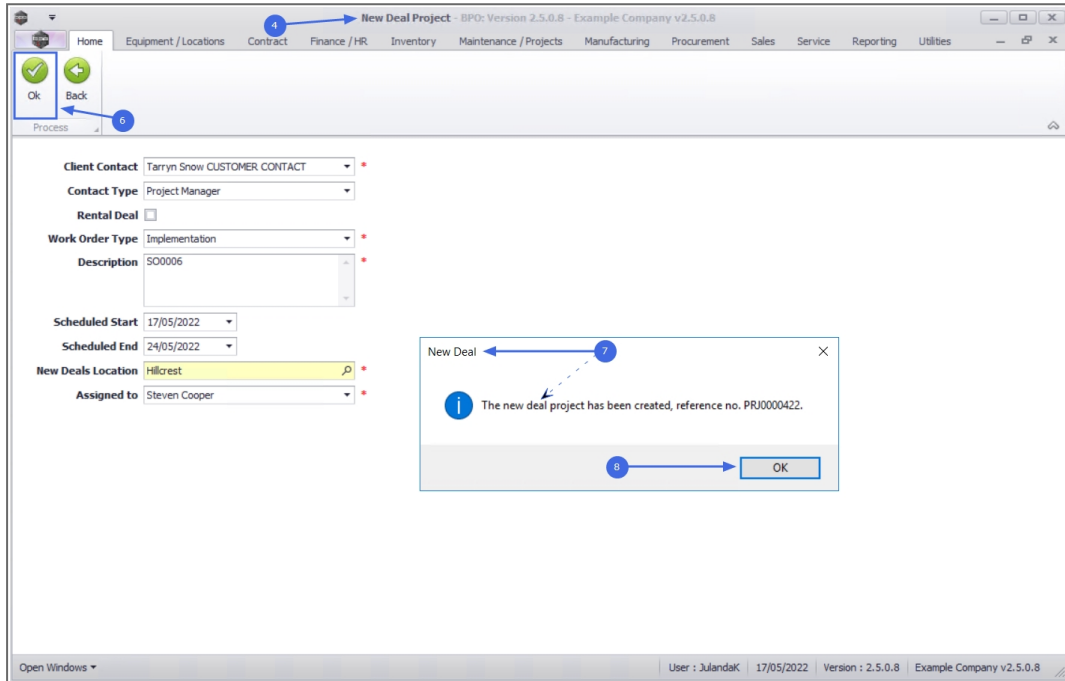
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

- From the **Sales Orders for Customer [Customer Code]** screen,
- Click on the **row** of the **Sales Order** you wish to convert to a New Deal Project.
- Click on **New Deal Project**.

 **Short cut key:** Right click to display the **All groups** menu list. Click on **New Deal Project**.



- "The New Deal Project screen will be displayed. " on page 3
- Complete the New Deal Project Details as required,
- Click on **OK** to save the new deal details.
- When you receive the **New Deal** message to confirm;
 - **The new deal project has been created, reference no. [reference number]**
- Click on **OK**.



- You will return to the **Sales Order** screen.

For a detailed handling of this topic refer to [Orders - Convert to New Deal Project](#)

PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to Print a Sales Order and / or Print a Proforma Invoice from the;

- Sales Orders screen
- Add New Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the proforma invoice will be printed from the View Customer Order - [Order Number] screen. The same procedure can be followed from any of the above mentioned screens.

- From the **View Customer Order - [Order Number]** screen,
- Click the print option that you require.



Print Sales Order



Print Proforma Invoice

- The example has **Print Sales Order** selected.

The screenshot shows the 'View Customer Order' screen for order OR0000342. The 'Print Sales Order' option is highlighted with a blue arrow and a red circle. The screen displays customer information, order details, and a table of order lines.

| SuppressOnPrint | ItemType | ItemCode | ItemDescription | OrderLineDescription | WarehouseName | Quantity | QuantityPerUOP | UnitType | UnitCost | Markup | Discount | UnitSellingPrice | BaseCycPri |
|-----------------|----------|----------|---------------------|-------------------------|---------------|----------|----------------|----------|----------|--------|----------|------------------|------------|
| No | WARR | 1YSW | 1 Year Supplier ... | 1 Year Supplier Warr... | | 1.000 | 0.000 | | 0.000 | 0.000 | 0.000 | 25,000.00 | 25,000 |

Summary Totals:

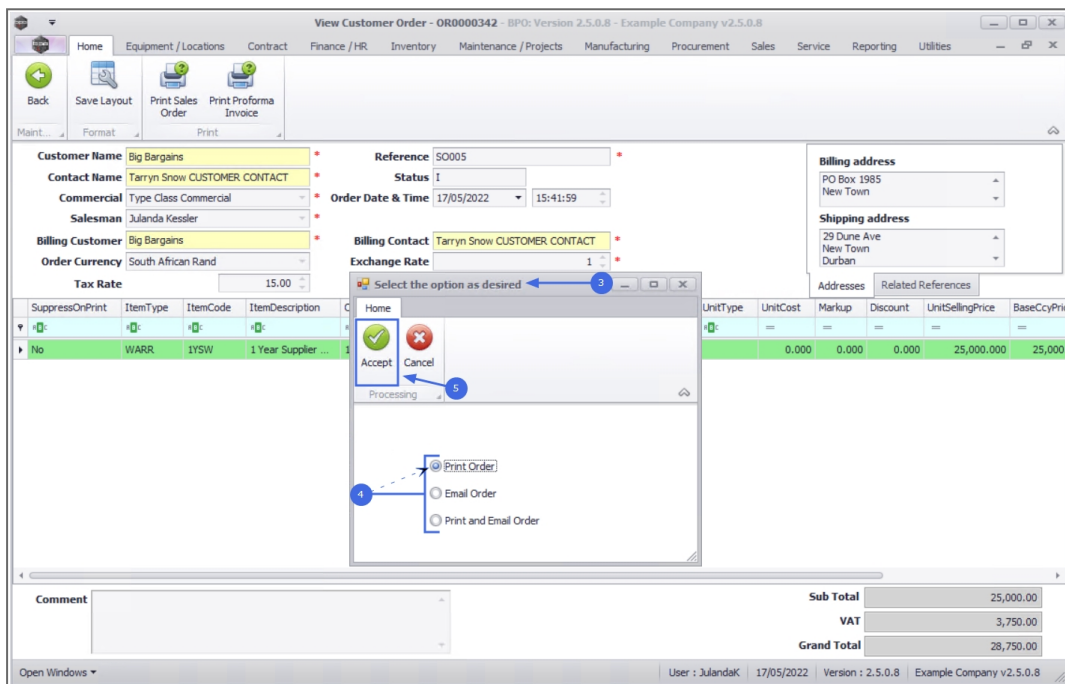
| | |
|--------------------|-----------|
| Sub Total | 25,000.00 |
| VAT | 3,750.00 |
| Grand Total | 28,750.00 |

- The **Select the option as desired** message will display.
- Click on the **radio button** to select either **Print Order**, **Email Order** or **Print and Email Order**.



When selecting to **Email the Quote**, the quote will be emailed via the **BPO Email Service** on the server and **not** from MS Outlook.

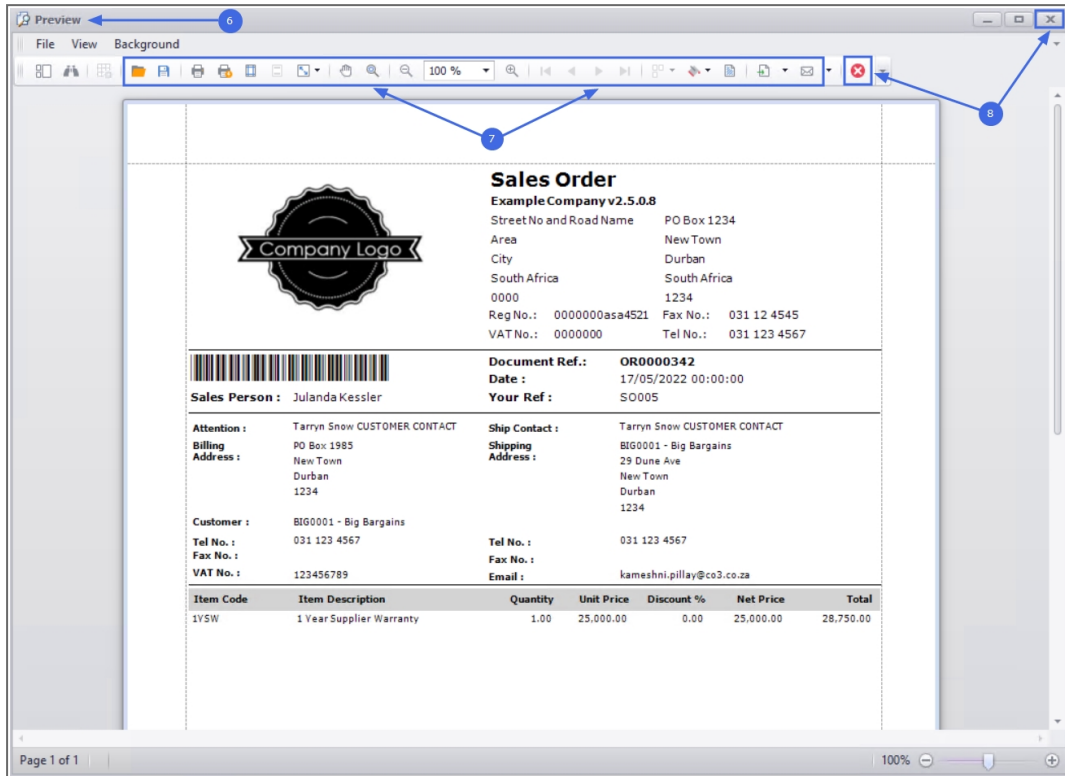
- The example has **Print Order** selected.
- Click on **Accept** to proceed.



- The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the **Preview** screen.
- You can make cosmetic changes to the document, as well as **Save**, **Print**, **Export**, **Add a Watermark** or **Email** the Sales Order or Proforma Invoice.
- Click on **Close** to return to the **Sales Quotes for Customer** screen.



For a detailed handling of this topic refer to [Orders - Print Sales Order](#) or [Orders - Print Proforma Invoice](#)



MNU.122.027

