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

SALES

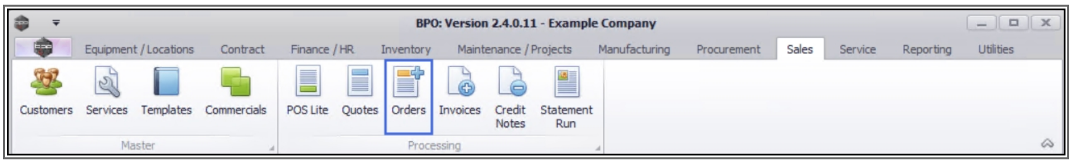
ORDERS – ADD SALES ORDER

You will encounter a **Customer** and a **Billing Customer** on both the Sales Order and the Sales Invoice.

Customer (Main Customer) - is the client who is ordering the parts / services.

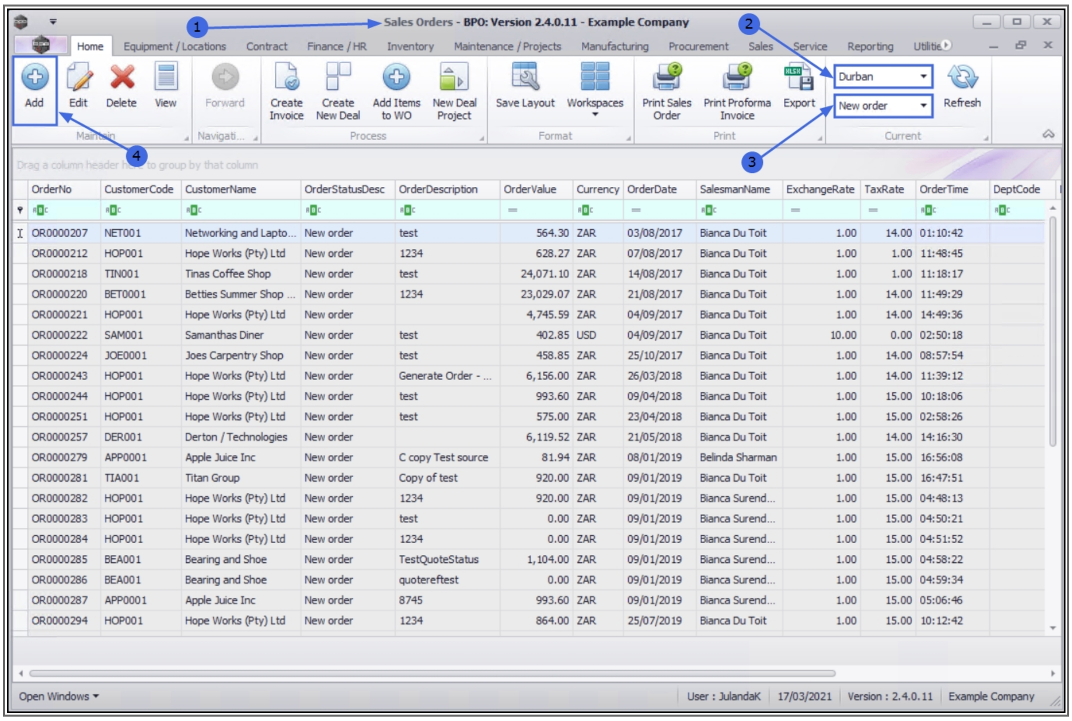
Billing Customer - is the client / finance party who will be paying for the parts / services.

Ribbon Access: Sales > Orders



1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where you need to create an order.
    - The example has **Durban** selected.
3. An Order can be Created from any **Status**.
    - The example has **New Order** selected.
4. Click on **Add**.

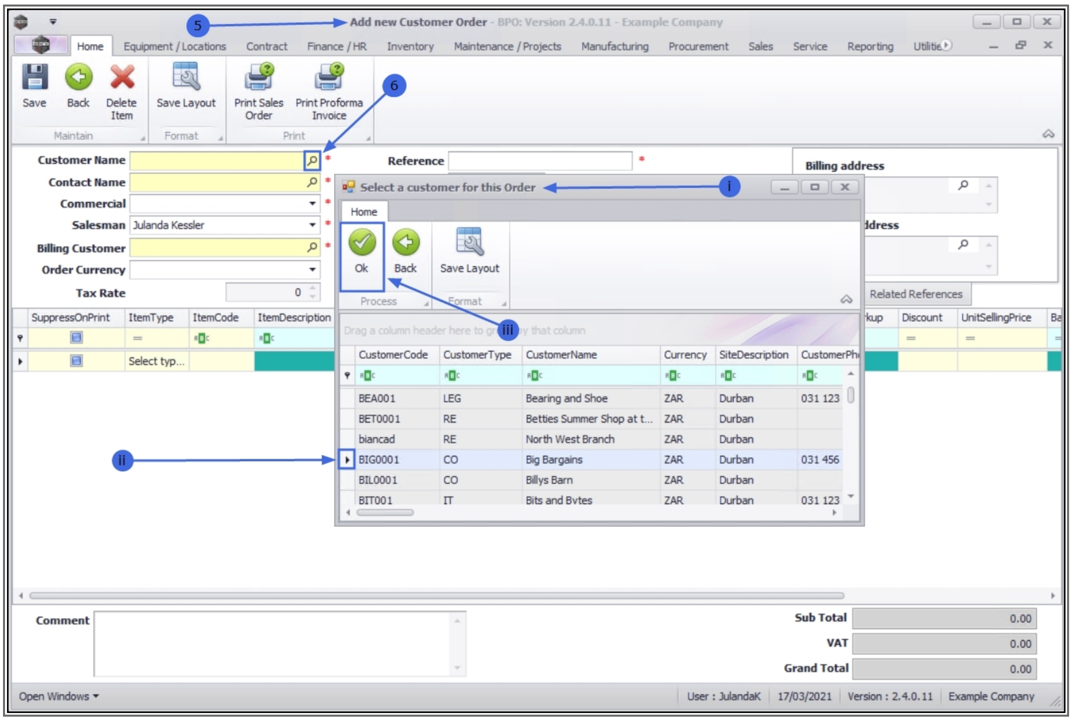
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



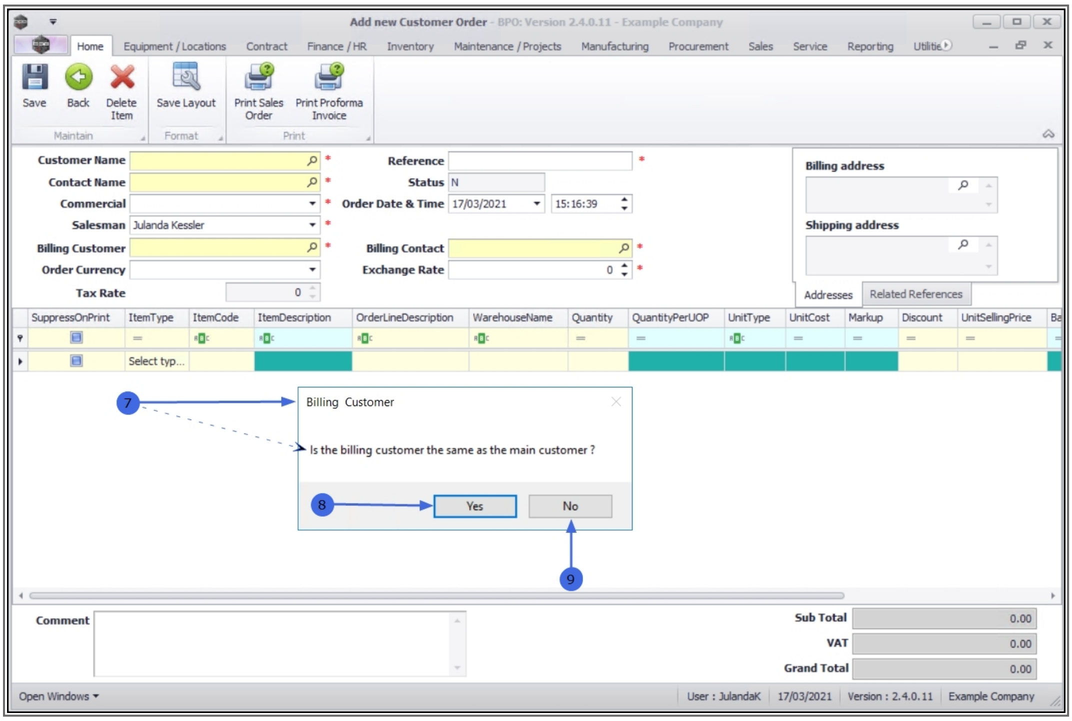
5. The **Add new Customer Order** screen will be displayed.

SALES ORDER HEADER

6. **Customer Name:** Click on the **search** button to select the customer.
   i. The **Select a customer for this Order** screen will display.
   ii. Select the **row** of the customer you are placing the order for.
   iii. Click on **OK**.



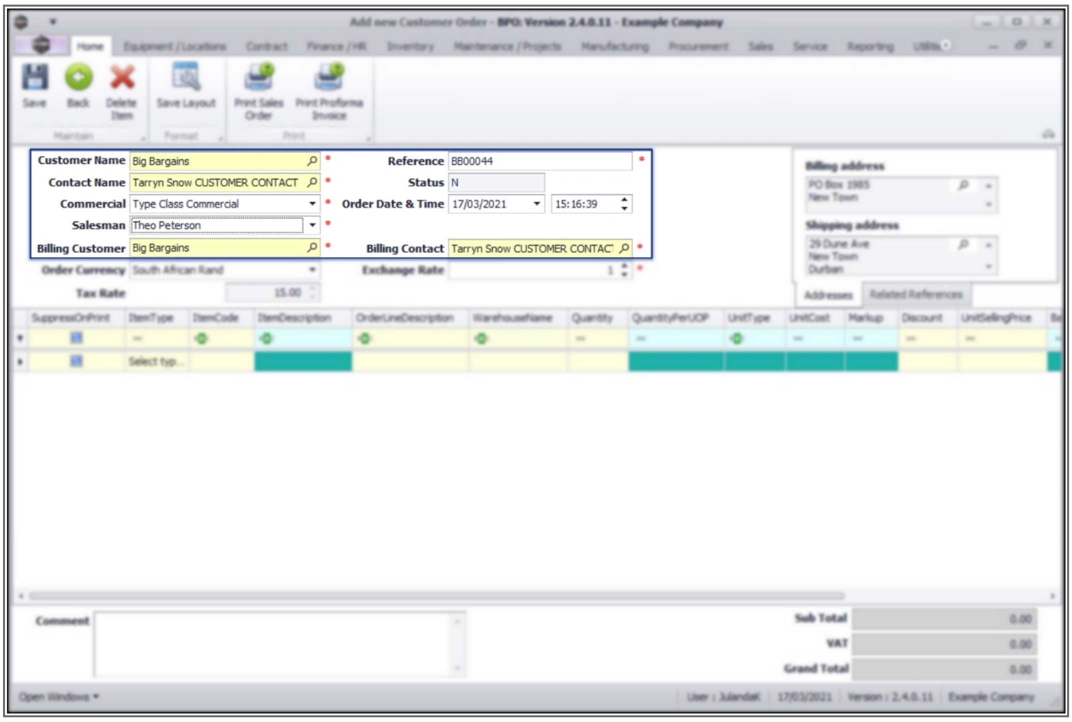
7. When you receive the **Billing Customer** message to confirm;
    - **Is the billing customer the same as the main customer?**
        - The Main Customer refers to where the items are being shipped.
        - The Billing Customer refers to the Account Holder who will pay for the goods/services.
8. Click **Yes** if the Billing Customer is the same as the Main Customer or
9. Click **No** if the Billing Customer is different to the Main Customer.



- **Contact Name:** Click on the **search button** to select the contact name using the steps as explained above.
- **Commercial:** This is the default **commercial**[1] configured for the customer. A different commercial can be selected by clicking on the down **arrow**, if required.
- **Salesman:** This field will auto populate with the person currently logged in to the system. Click on the down **arrow** to select an alternative salesman from the list, if required.
- **Billing Customer:** This field will already be populated if the Customer is the same as and Billing Customer. If not, click on the **search button** to select the customer who will be paying for this invoice.
- **Reference:** Type in a reference for the sales order.
- **Status:** The status field will display [**N**] for **New** by default.

[1]Commercial is the mark up structure for the item. The original price of the item, including the company profit margin

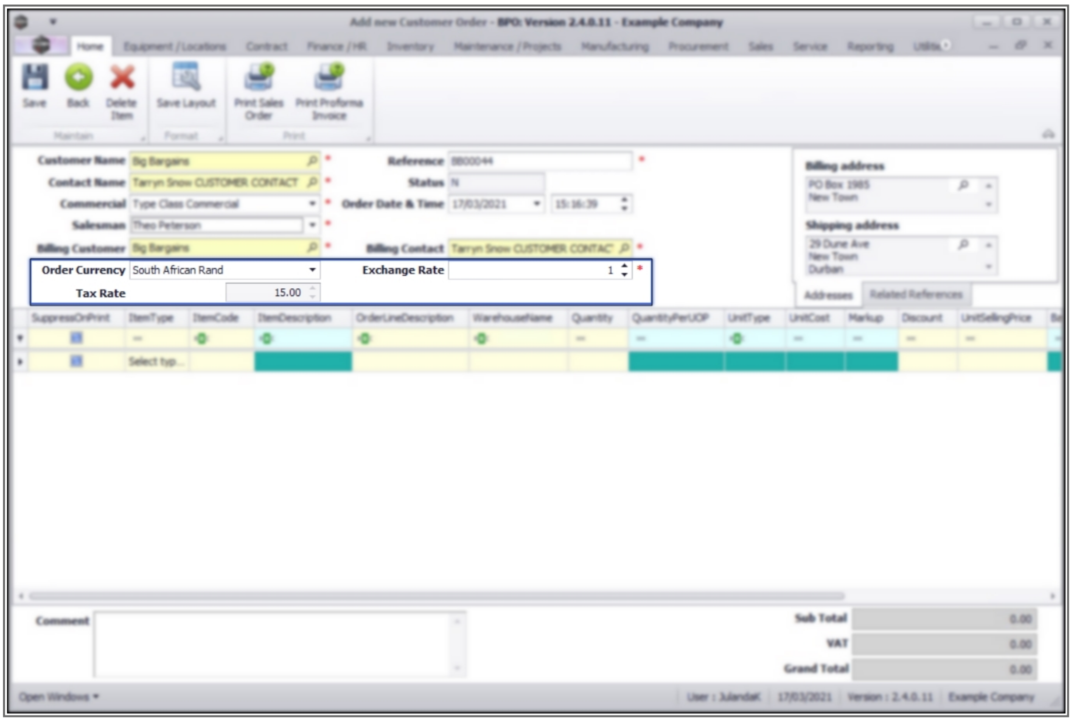
- **Order Date and Time:** The current date and time that the order has been placed, will display.
    - The date can be changed by clicking on the down arrow to change the date using the Calendar function, if required.
    - Click on the **arrow indicators** to adjust the time, if required.
- **Billing Contact:** Click on the **search button** to select the billing contact, following the steps for adding a Customer Name.



FINANCIAL HEADER

- **Order Currency:** This field will populate based on the currency set up for the customer. Use the drop-down **arrow** to select an alternative currency from the drop-down menu, if required.
- **Tax Rate:** This field will populate based on the currency set up for the customer and can not be changed on this screen.

- **Exchange Rate:** This field will populate based on the exchange rate set up in the system. Type in or use the **arrow indicators** to adjust the exchange rate, if required.



ADDRESSES TAB

- **Billing Address**[1]**:** The billing address need to be added to the customer before linking the order. Click on the **search** button to select the billing address.
- **Shipping Address**[2]**:** This field needs to be completed. If the Shipping Address field has not populated, click on the **search** button to select the address where the goods can be shipped to.

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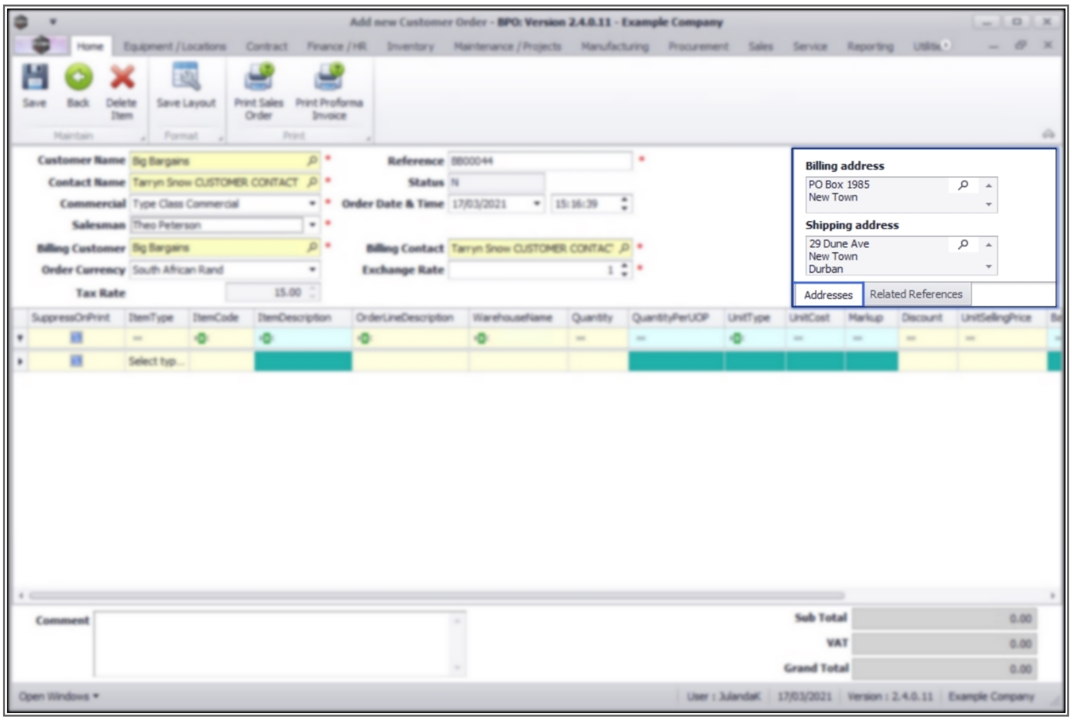
[1] A Billing address is where the invoice for an order will be sent, whether it is a business-to-business (commercial) order or consumer order. You must define a billing address for any order.
[2] A shipping address is the address where an order will be sent.



RELATED REFERENCES TAB

10. Click on the **Related References** tab.

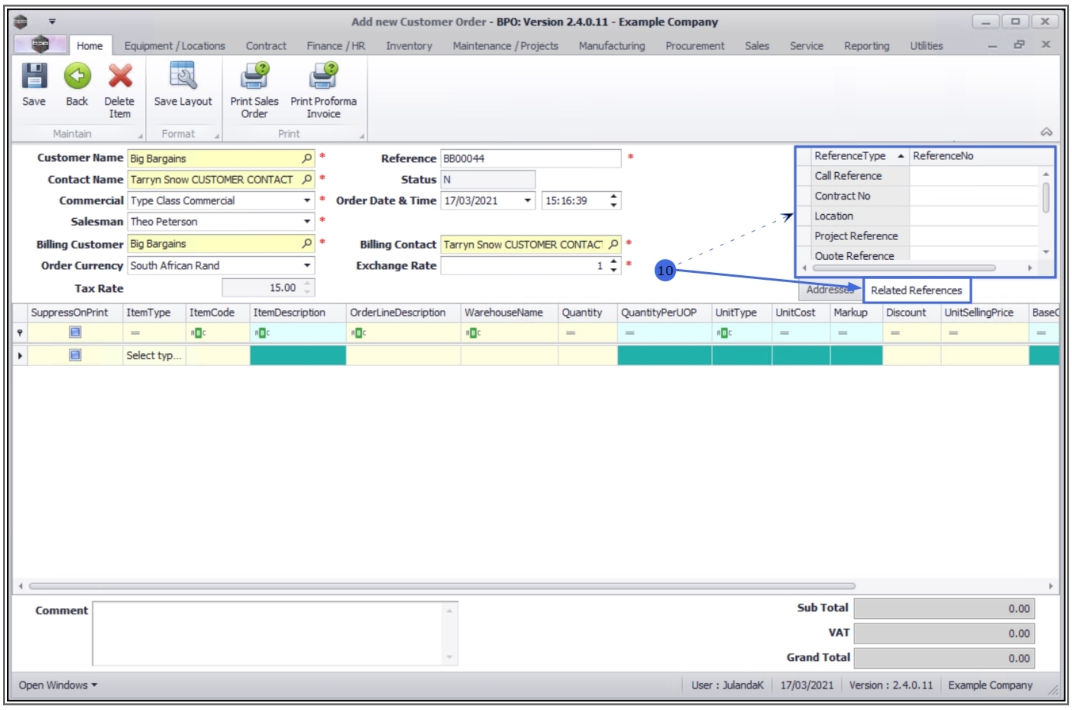
    - The sales order that you are creating, may be linked to one or more of the following reference types:
        - Serial No
        - Call Reference
        - Contract No
        - Location
        - Project Reference
        - Quote Reference
        - Work Order Reference

    Note on using the Reference No's:

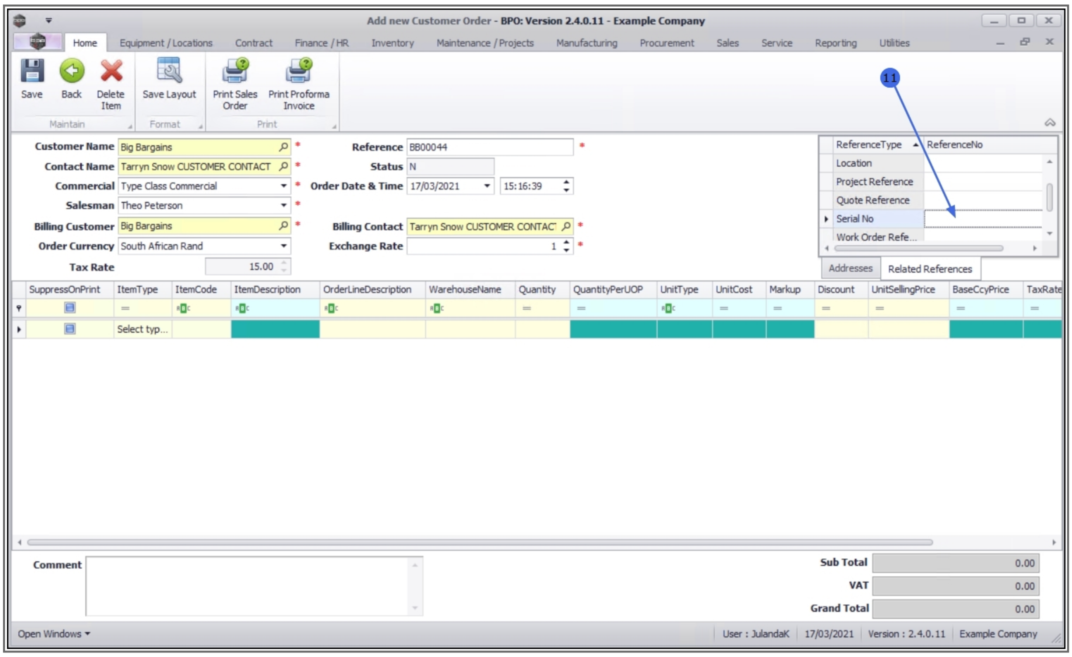
    - You can select a **Reference Type** and **Reference No** before you select a customer for all types, except the **Call**

Reference Type which requests that a customer is selected first.

- With the other Types, when the **Reference Type** and **No** are selected, the linked **customer details** will populate the **Customer** and **Financial** heading fields.
- When the **Reference Type** and **No** are selected, other Reference No's linked to the initially selected number can also populate other Reference fields.



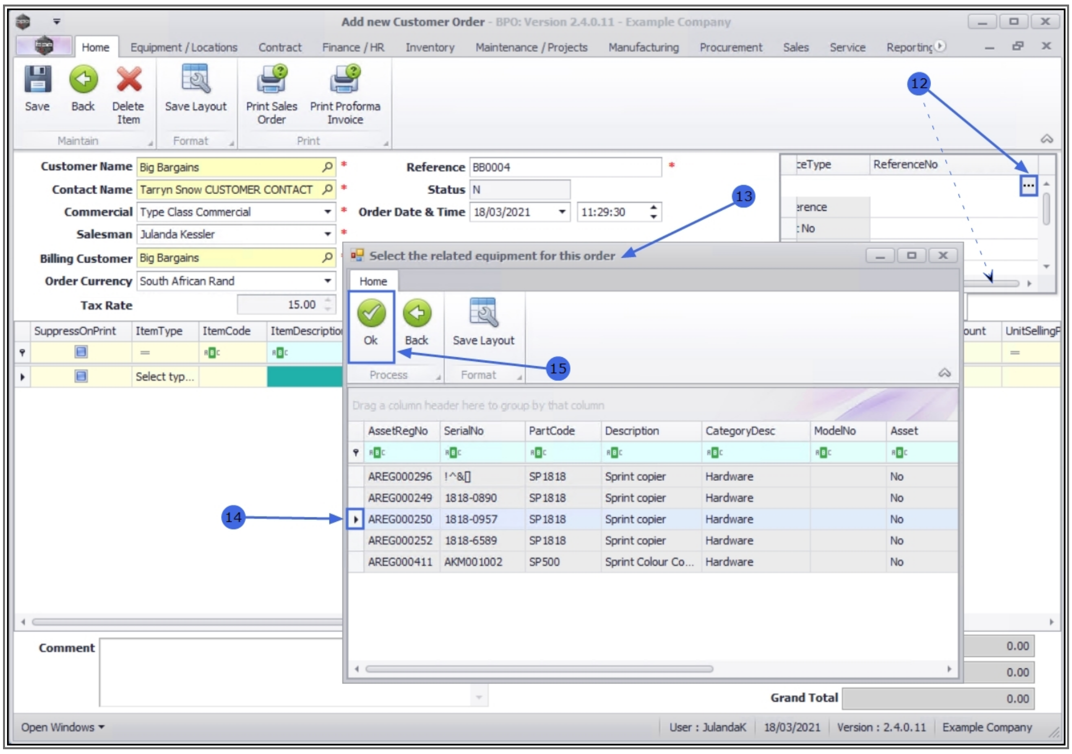
11. Click in the **Reference No** field of the Reference Type you wish to link to this order.
    - The example has **Serial No** selected.



12. An **ellipsis** button will be available at the end of the field.
    - Use the scroll bar to scroll to the left or right of the screen to display information that may be hidden.
13. Click on the ellipsis button to display the **Select the related equipment for this order** screen.

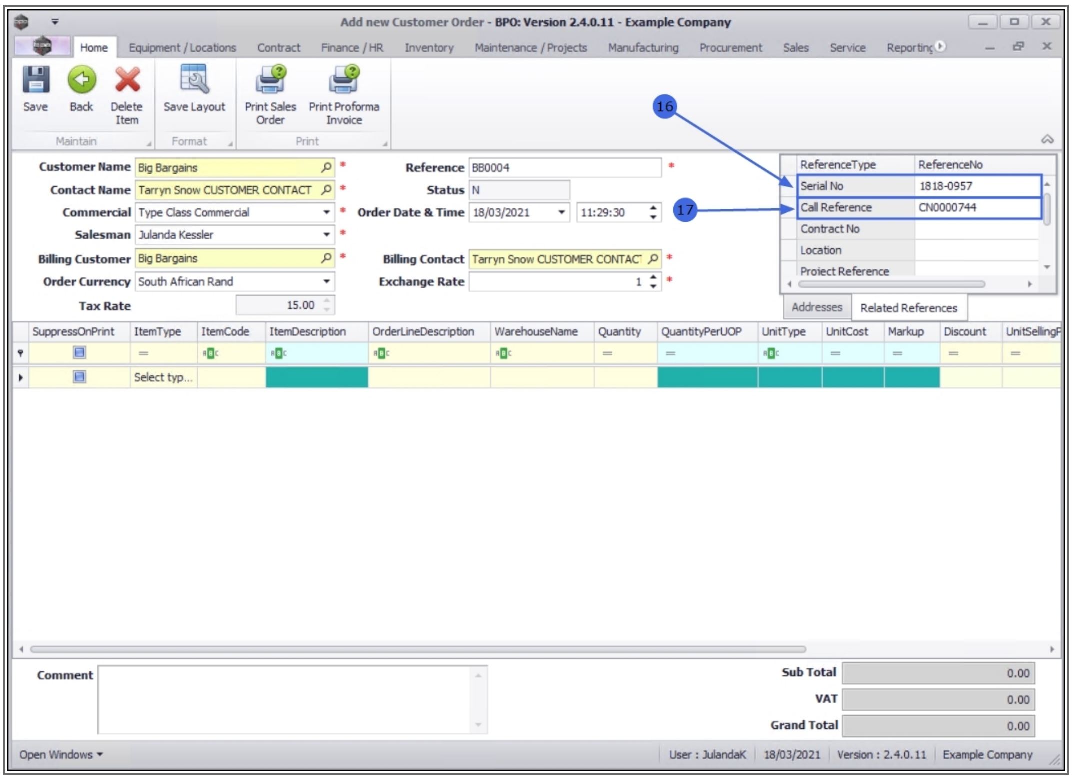
> The 'Select...[ ]' screen that displays will directly correspond to the Reference Type that has been selected. For example, if the Contract No Type is selected, then the 'Select the related contract for this order' screen will display.

14. Click on the **row** of the item that you wish to link to this sales order.
15. Click on **OK**.



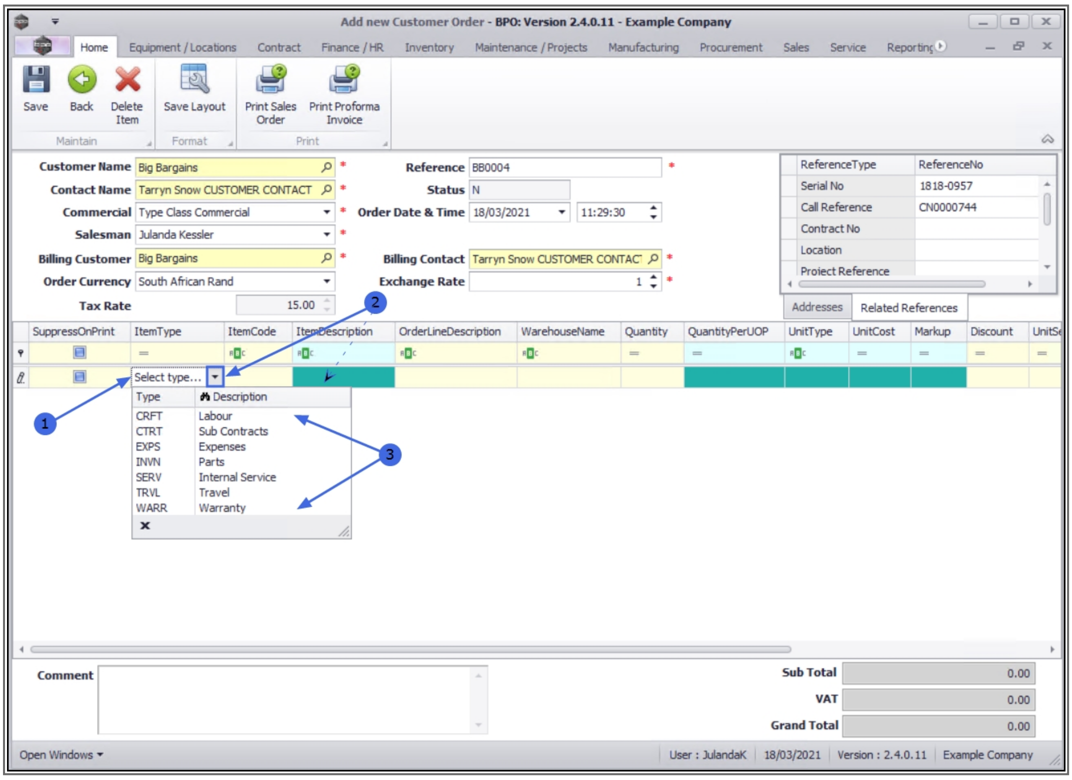
16. The selected **Serial No** will populate the **Related References** frame.
17. The example also has a **Call Reference** linked to the selected serialised item as the Customer request was made from a Call.

> There can be <u>different</u> variations of this e.g. a selected Order No can have a Work Order or Project Reference linked to it.



ADD SALES ORDER ITEMS

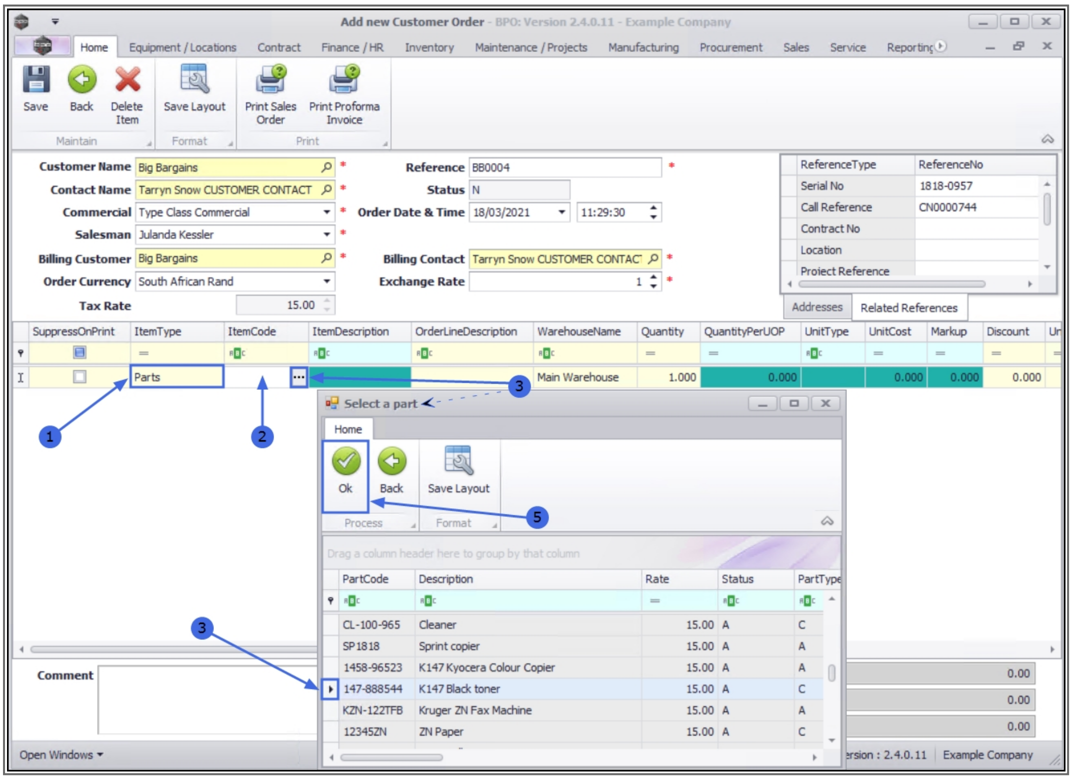
1. Click on the **Select type...** text box below **Item Type** to display the down **arrow**.
2. Clicking on the **arrow** will display the **Item Type** drop-down list.
3. From the list, select one of the following:
    - **CRFT** Labour craft, i.e. Technician
    - **CTRT** Sub Contracts / Third Party Labour/Service
    - **EXPS** Expenses
    - **INVN** Parts
    - **SERV** Internal Labour/Service
    - **TRVL** Travel
    - **WARR** Warranty



1. The example has **Parts** as the Item Type selected.
2. Click in the **Item Code** text box to display the **ellipsis** button.
3. Clicking on this button will display the **Select a [ ]** screen.

> The Select a [ ] screen will always correspond with the Item Type initially selected e.g. if Labour was initially selected then the Select a craft screen will display.

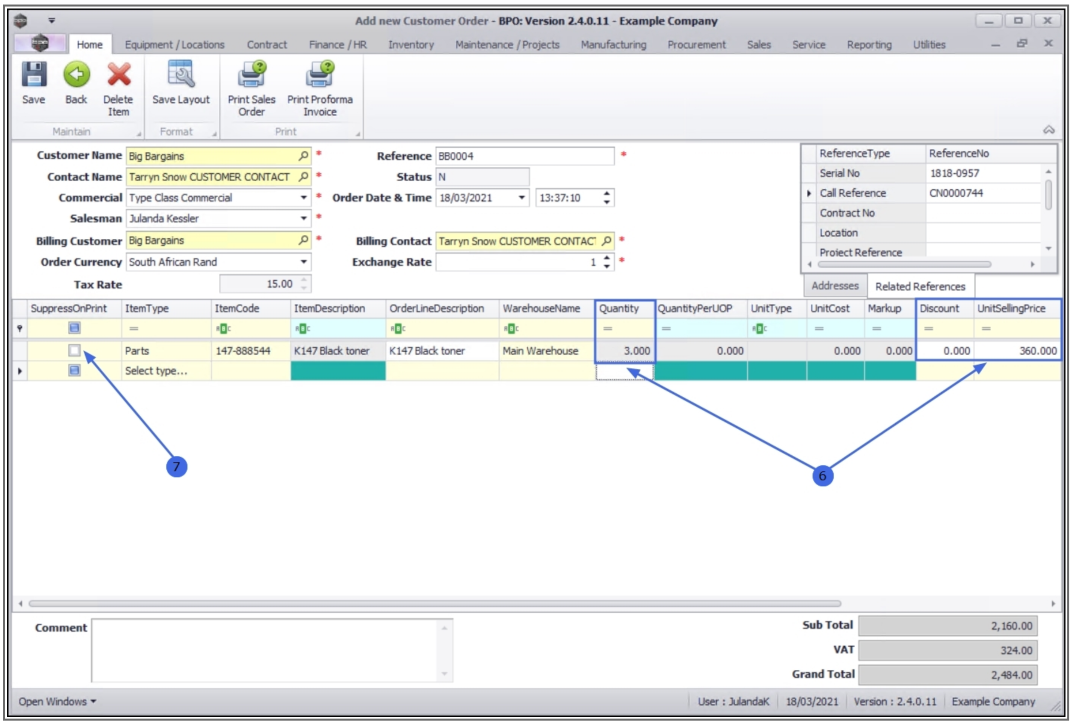
4. Click on the **row** of the **Part** you wish to select.
5. Click on **OK**.



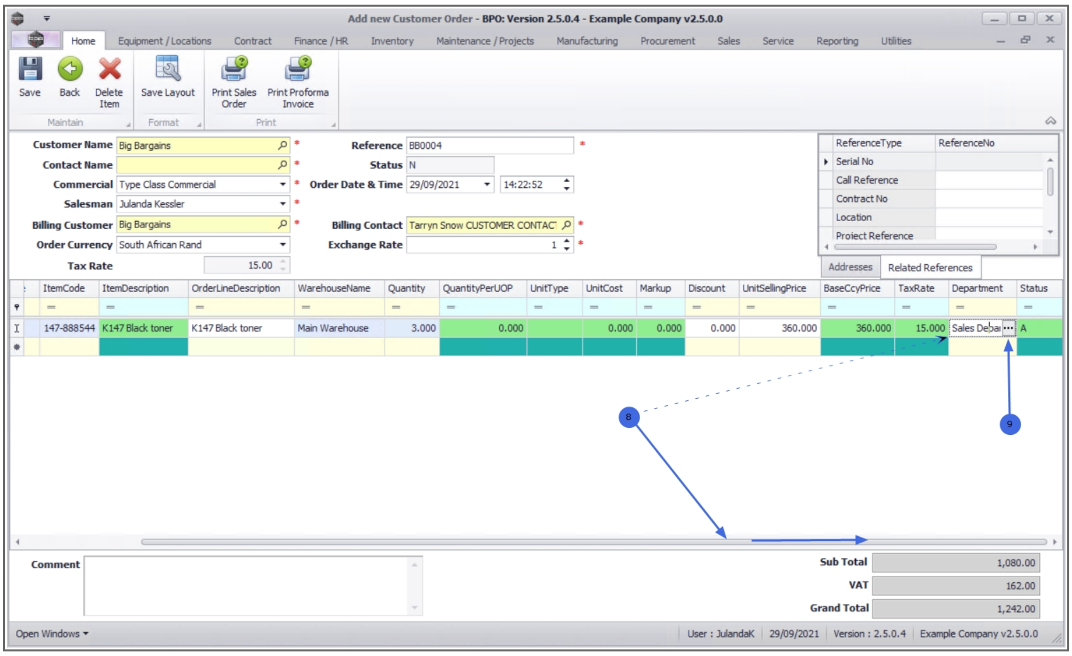
Edit the Quantity, Discount and Unit Selling Price

6. To adjust the **Quantity**, **Discount** and **Unit Selling Price**, click in the required field and type in or use the directional **arrows** to select the required value.
7. **Suppress on Print** check box: The check box must only be selected for the line items that you do **not** want printed on the Sales Invoice.

> The Sub/Grand Total will not be affected, but the visible selling prices will not match up with the invoice totals.



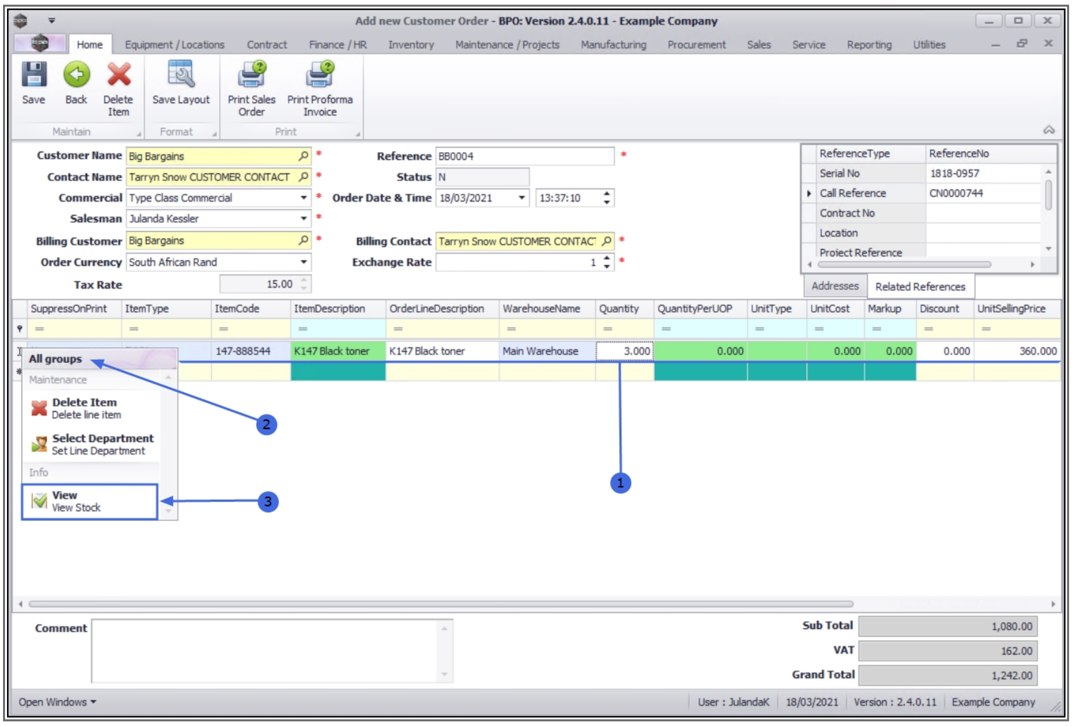
8. Use the scroll bar to scroll across the screen to view the **Department** column.
9. If the department was not populated then add a Department by clicking on the **ellipsis** button to select the Department for this item.



View Stock

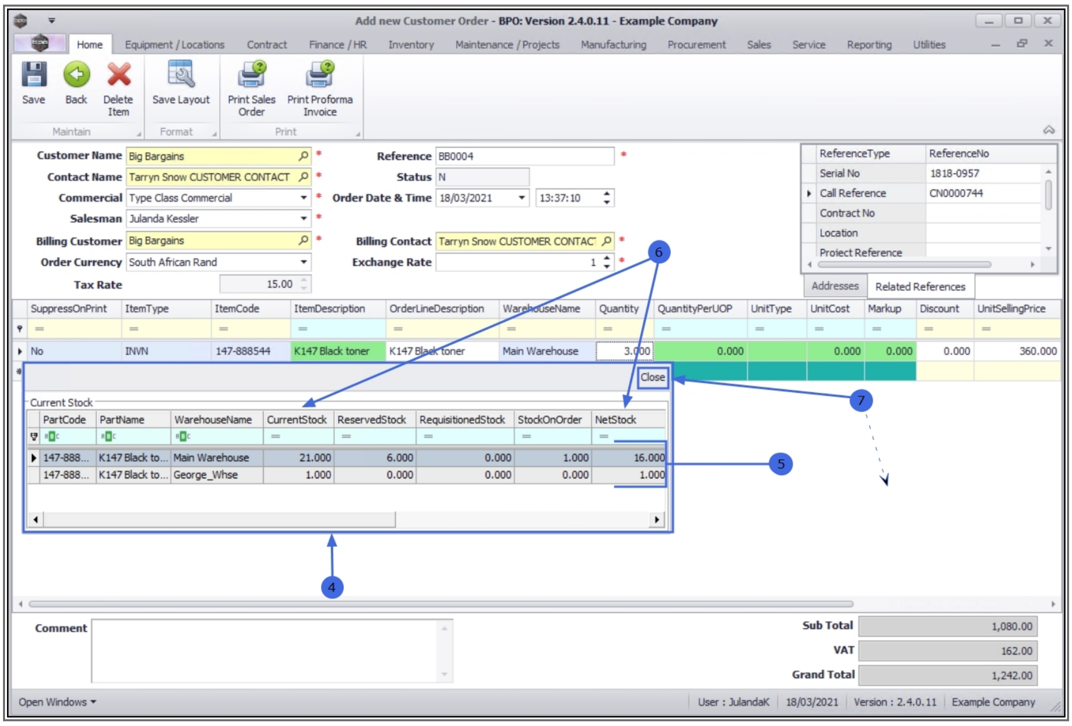
When creating an Order, the salesman is able to check the **stock quantities** of items that he wishes to include in the Order. This enables him to manage the customer's expect-ations. For example, if there is short stock of a particular item, the customer can be informed that there may be a delay in delivery or that there is an alternative substitute item available, which the customer may prefer to ensure that an order is received timeously.

1. ***Right click*** anywhere in the ***row*** of the item that you wish to view the stock quantity of.
2. The ***All groups*** drop-down menu will display.
3. Select ***View*** - View Stock



4. The ***Current Stock*** data grid will be displayed.
5. Each row represents a ***warehouse*** that contains stock of the item.

6. Scroll across the data grid, if necessary, until you can view the stock ***quantities*** e.g. Current Stock or Net Stock, in each warehouse.
7. This list now also returns alternate parts in stock : Version Compatibility[1]
8. Click on **Close** or anywhere outside the Current Stock data grid to close the window.



Add additional line items

8. On the next available line, click in the text box of the **Item Type** column below the item you have just added. Refer to" Add Sales Order Items" on page 11 for details on how to complete the line item.

[1] BPO2 v2.4.0.11 or higher

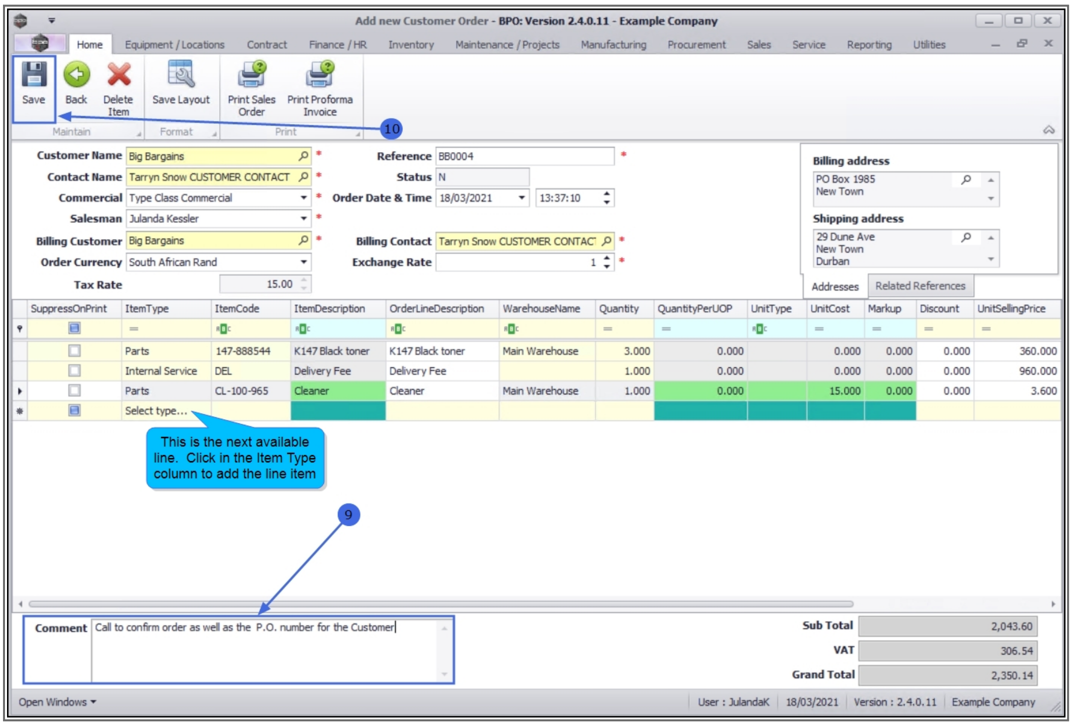
Click only on the **Suppress on Print** column check boxes of the items that you do **not** want visible on the printed Sales Invoice. This will not affect the **Sub/Grand Total** but the selling prices that are visible will not match up with the invoice totals.

ADD COMMENTS

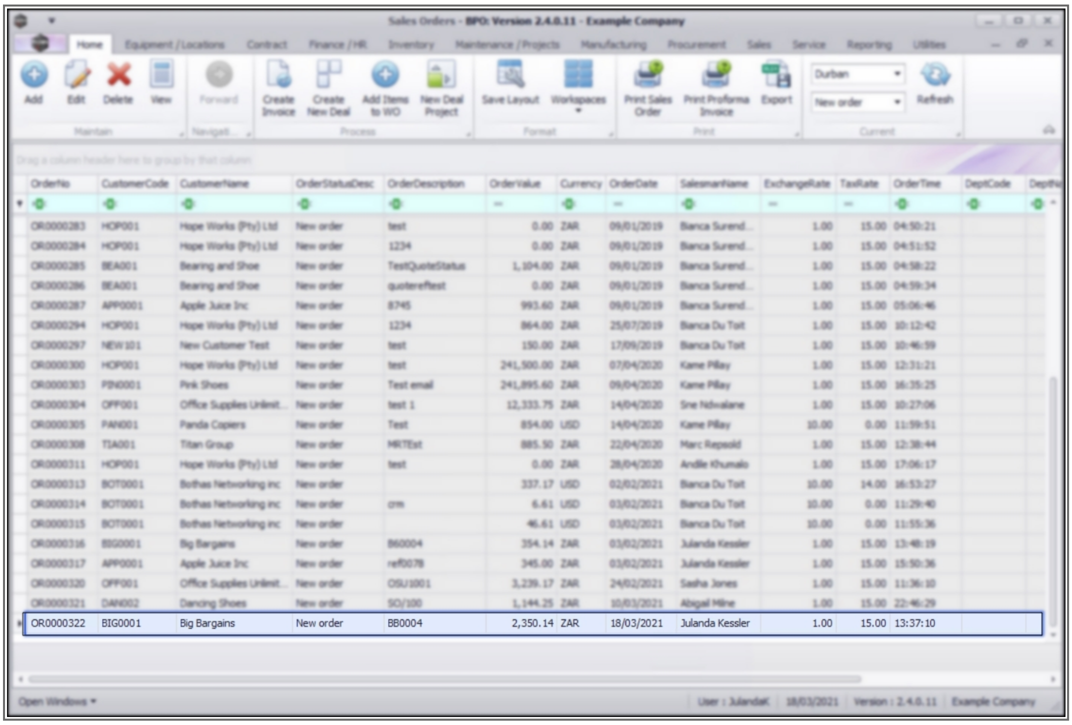
9. Click inside the Comments text box to type a comment relating to this order.

SAVE THE SALES ORDER

10. When you have finished editing the new customer sales order, click on **Save**.



11. The **Sales Orders** listing screen will be updated with the new sales order you have created.



Related Topics

- Edit / Delete / View a Sales Order
- Print / Email a Sales Order
- Print Pro-Forma Invoice
- Create Sales Invoice from Sales Order
- Create New Deal Sale / Rental (creates a call)
- Create New Deal Project Sale / Rental

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