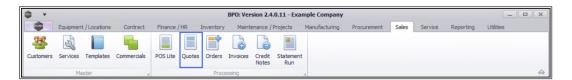


We are currently updating our site; thank you for your patience.

SALES

ORDERS - EDIT SALES ORDER

Ribbon Access: Sales > Orders



- 1. The Sales Orders listing screen will be displayed.
- 2. Select the **Site** where the Sales Order is located.
 - The example has **Durban** selected.
- To edit an Order ensure that the Status is set to New Order or Proforma.
 - The example has **New Order** selected.
- 4. Select the **row** of the Sales Order that you wish to **edit**.
- 5. Click on **Edit**.

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



Orders - Edit Sales Order

ер на Ср 🚺	me Equipment	/Locations Contract			mance / Projects	Manufa	cturing Pro	curement Sales		leporting	• 42	- 8	3
Add Edit	Delete View	Invoic	e Create Add	Items New Deal WO Project	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice		order	• Refrest	1	
Ma	intain	Navigati 🖌	Process		Format		4	Print	1	Currer	nt	4	
									2		3		
OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	
R C	* 0 ¢	4 0 0	n O c	* 0 0	-	* 0 0		ROC	-	-	A C	a 🗖 c	
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
OR0000303	PIN0001 9	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
OR0000305	PANOOT	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
OR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
OR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
OR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
OR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
OR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
OR0000316	BIG0001	Big Bargains	New order	B60004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
OR0000317	APP0001	Apple Juice Inc	New order	ref0078	345.00	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	15:50:36		
9R0000320	OFF001	Office Supplies Unlimit	New order	OSU1001	3,239.17	ZAR	24/02/2021	Sasha Jones	1.00	15.00	11:36:10		
OR0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		
OR0000322	BIG0001	Big Bargains	New order	BB0004	2,350.14	ZAR	18/03/2021	Julanda Kessler	1.00	15.00	13:37:10		

6. The Edit Customer Order - [customer code] screen will be displayed.

HEADER INFORMATION

- **Customer Name:** Click on the **search button** to select an alternative customer name.
- **Contact Name:** Click on the **search button** to select an alternative customer contact.
- **Commercial:** This is the default commercial configured for the customer. Click on the down **arrow** to select an alternative commercial from the list.
- **Salesman:** Click on the down **arrow** to select an alternative salesman from the list.
- Billing Customer: To change the billing customer, click on the search button to select the customer who will be billed for the order.
- **Reference:** Click in the text box to update the reference number.



- Status: The status for the order will display as [N] for New order or [F] for Pro-forma.
- Order Date and Time: The date and time the order has been placed, will display.
 - To change the date, type in or click on the arrow to choose an alternative date using the Calendar function.
 - To adjust the time, type in or click on the arrow indicators.
- **Billing Contact:** Click on the **search button** to select an alternative billing contact.

\$	Ŧ		6		Edit Customer Order -	DR0000322 - BPO:	Version 2.4.0	.11 - Example Cor	npany					x
	Home	Equipment / I	Locations (Contract Fir	nance / HR Inventory	Maintenance / Proje	cts Manufa	cturing Procurem	ent Sales	Service	Reportin	g Utilities		×
ľ		6		9	9									
Sa	ive Back Dele Ite				Proforma voice									
														\Diamond
	Customer Name	Big Bargain	s	م	Reference	B0004		•		Billin	ig address			
	Contact Name	Tarryn Sno	W CUSTOMER	CONTACT P	 Status 	4					Box 1985		,P +	
	Commercia			•		18/03/2021 -	13:37:10				Town		Ψ.	
		Julanda Kes		•							ping addr	255		
	Billing Customer			م	Dining Contact	Tarryn Snow CUSTOM	ER CONTACT &	*		New	une Ave Town		<u>^</u> _	
	Order Currency	South Afric	an Rand	*	Exchange Rate		1			Durb	oan			
	Tax Rate	: :		15.00 🤤						Addre	esses Re	lated Referen	ces	
	SuppressOnPrint	ItemType	ItemCode	ItemDescriptio	on OrderLineDescription	WarehouseName	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	Base
9		-	ROC	R C	a 🗖 c	8 🗖 C	-	-	a ⊡ c	-	-	-	-	-
Þ		Parts	147-888544	K147 Black to	Ner K147 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.00	0
		Internal S		Delivery Fee	Delivery Fee		1.000			0.000			960.00	
		Parts	CL-100-965	Cleaner	Cleaner	Main Warehouse	1.000	0.000		15.000	0.000	0.000	3.60	0
*		Select typ												
4.0														
	Comment Call to	o confirm orde	er as well as th	e P.O. number	for the Customer					Sub To	otal		2,043.6	D
										Grand To	VAT		306.5	
													2,350.1	
Op	en Windows 🔻							User	: JulandaK	19/03/2021	1 Version	: 2.4.0.11	Example Compar	iy ,

FINANCIAL HEADER

• Order Currency: Click on the search button to select an alternative currency from the menu.



- **Tax Rate:** This field will populate based on the currency set up for the customer and cannot be edited from this screen.
- Exchange Rate: This will populate based on the exchange rate set up in the system. Use the directional arrows to increase or decrease the exchange rate.

-	¥						OR0000322 - BPO								x
1	Home	Equipment / I	Locations	Contract Fi	nance / HF	R Inventory	Maintenance / Proj	ects Manufac	turing Procurem	ent Sales	Service	Reportin	g Utilities		×
S	ave Back Dele Iter	n	C	order II	Proforma voice										
															2
	Customer Name	Big Bargain:	S	م	•	Reference	BB0004				Billin	g address			
	Contact Name	Tarryn Sno	W CUSTOMER	CONTACT P	*	Status	N					Box 1985		<u>^</u> م	
	Commercial	Type Class	Commercial	*	* Orde	r Date & Time	18/03/2021 -	13:37:10			New	Town		· •	
	Salesman	Julanda Kes	ssler	*	*							ping addre	255		
	Billing Customer	Big Bargain:	s	م	*	Billing Contact	Tarryn Snow CUSTO	MER CONTACT ,P	*			une Ave Town		<u>^</u> م	
	Order Currency	South Afric	an Rand	•	E	xchange Rate		1. 🗘	•		Durb	ban			
	Tax Rate			15.00 🤤							Addre	esses Rel	lated Referer	nces	
	SuppressOnPrint	ItemType	ItemCode	ItemDescripti	on Or	derLineDescription	WarehouseNam	e Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	Base
9		-	ROC	A C	8	le .	a 🛛 c	-	-	ROC	-	-	-	-	-
Þ		Parts	147-888544	K147 Black to	ner K1	.47 Black toner	Main Warehouse	3.000	0.000		0.000	0.000	0.000	360.00	0
		Internal S	DEL	Delivery Fee	De	livery Fee		1.000	0.000	1	0.000	0.000	0.000	960.00	0
		Parts	CL-100-965	Cleaner	Cle	eaner	Main Warehouse	1.000	0.000	1	15.000	0.000	0.000	3.60	0
*		Select typ													
4	Comment Call to	confirm orde	er as well as th	e P.O. numbe	for the C	ustomer					Sub To			2,043.6	
												VAT		306.5	4
											Grand T	otal		2,350.1	4
0	pen Windows 🔻								User	: JulandaK	19/03/202	1 Version	: 2.4.0.11	Example Compar	Y //.

ADDRESSES TAB

- **Billing Address:** A billing address needs to be added for the customer before linking the order.
 - i. To change the Billing Address, click on the **search** button to display the **Select an address for this order** screen.
 - ii. Click on the **row** of the Billing Address that you wish to add.
 - iii. Click on **OK**.



	Ŧ				Ec	lit Customer O	order - OR000	0322 - BPO: Vo	ersion 2.4.0.1	L - Example C	ompany					x
	Home I	Equipment / l	Locations	Contrac	t Financ	e / HR Inver	ntory Mainte	enance / Project	Manufactu	ring Procur	ement Sales	Service	Reportin	g Utilities	- 8	х
s	ave Back Dele Iter	m	ayout Pri	nt Sales Order	Invoid											~
_	Maintain	∡ Form		F	Print	4				15						\$
	Customer Name				• م		ence BB0004		100	•			ig address		*	
	Contact Name			CONTA	-	-	tatus N						Box 1985 Town		* ۹	
	Commercial				•	Order Date &	Time 18/03/2	021 - 1	:37:10 🛟						Ψ.	
		Julanda Kes		🖳 S	elect an a	ddress for this	order 🖌						ping addre	255		
	Billing Customer			Hor	ne							New	Town		<u>^</u> م	
	Order Currency		an Rand			D						Durb			Ŧ	
	Tax Rate											Addre	esses Re	ated Referer	ices	
		ItemType	ItemCode	Ok	Back	Save Layout						UnitCost	Markup	Discount	UnitSellingPrice	Base
٩		-	ROC		rocess	J Format					\diamond	-	-	-	-	-
۲		Parts	147-888544									0.000				_
		Internal S						AddressLine3	Address ine4	Address ine 5	PostCode	0.000				-
-		Parts Select typ	CL-100-965	P =[Addresschielt	REC	Addresschieb	REC	AGG ESSENCES	REC	15.000	0.000	0.000	10.80	0
*		Select typ	_	BI		PO Box 1985	-	Durban			1234					
*	Comment Call to	o confirm orde	er as well as t	4 =									VAT		6,130.8 919.6	
							-					Grand To	otal		7,050.4	2
Op	en Windows 🕶									U	ser : JulandaK	19/03/2021	Version	: 2.4.0.11	Example Company	iy In

- **Shipping Address:** Ensure that a Shipping Address has been added for the Customer.
 - Add or change the shipping address by clicking on the search button to display the Select an address for this order screen.
 - ii. Click on the **row** of the shipping address you would like to add for this customer.
 - iii. Click on **OK**.



\$ v		Edit Cu	stomer Order -	OR0000326	- BPO: Versio	n 2.5.0.4 - Exa	imple Compa	ny v2.5.0.0					x
Home Equ	uipment / Locations Contract	Finance / HR	Inventory	Maintenance /	/ Projects	Manufacturing	Procuremen	t Sales	Service	Reporting	Utilities	- 1	8 x
Save Back Delete Item	Save Layout Format 4 Print Sales Pri Order	nt Proforma Invoice											\$
Customer Name Big	Bargains .	<mark></mark>	eference BB000)4		•			12	Billing a	ddress		
Contact Name Tar	rryn Snow CUSTOMER CONTACT	• م	Status N					1.15		PO Box	1985	P +	
Commercial Typ	pe Class Commercial	 Order Dat 	e & Time 29/09	/2021 🔻	14:22:52	\$	1.15	1		New Tor	wn	-	
Salesman Jul	landa Kessler	•					100				g address	×	
Billing Customer Big			Contact Tarryr	n Snow CUSTO	MER CONTACT	<mark>۹</mark>				29 Dune New Tor		* ٩	
Order Currency Sou			dress for this o	order	4	•••		_		Durban		Ŧ	
Tax Rate	15.00	Home								Addresse			
SuppressOnPrint Item	mType ItemCode ItemDescr		21							Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
Part										0.000		= 360.000	_
	ect typ	Ok Back	Save Layout							0.000	360.00	360.000	15.0
		Process	For						\sim				
		AddressType	AddressLine1 A	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode	Country				
		P REC	1 0 0	0:	R O C	a 🗖 C	4 0 0	10c	AD:				
		SHIP	29 Dune Ave	New Town	Durban			1234					
		SHIP											
		SHIP											
		SHIP	100 Kings R 0	Chelsea				KING01	South Afr				
۱)		F
Comment		4	-							Sub Total		1,080	.00
										VAT		162	.00
			Ψ.							Grand Tota		1,242	.00
Open Windows 🕶							l	Jser : Julandai	K 29/09/20	21 Version	: 2.5.0.4 Exam	ple Company v2.5.	.0.0 //.

RELATED REFERENCES TAB

- 1. Click on the **Related References** tab.
- Any reference numbers that have references linked to it, will be displayed. For example if the order is linked to a call or a project, then the call or project number will be displayed.
- 3. To **add** a reference number, or to **change** a reference number, click in the Reference Number column of the Reference Type you wish to work with, to display the ellipsis button.
 - The example has **Call Reference** selected.
- Click on the ellipsis button to display the Select the related call for this order list screen.
- 5. Click on the **row** of the Reference number that you wish to add.
- 6. Click on OK.



\$	Ŧ				Edit Cust	tomer Order	- OR0000322 - BPO: Ver	sion 2.4.0.11 - Ex	ample Compan	Ŋ					x
	Home	Equipment / I	Locations Co	ntract F	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	g Utilities	- 6	×
Save		te Savel	Layout Print:		t Proforma								4		
	Ite		Ord		Invoice					100		3		$\langle \rangle$	~
	Maintain	_⊿ Form		Print	4				1.11	2 C		_		\rightarrow	~~
	ustomer Name				*	Reference					ceTy		ReferenceNo 1818-0957		
	Contact Name					Status		27.10	2-			-	CN0000744		in 1
	Commercia	Julanda Kes				Date & Time		37:10 +			:No				
	Salesman Silling Customer			Selec	t the relate	d call for this	order 📥								- 1
	Order Currency			Home							tefer	ence			-
			an kanu		<	2					4				•
	Tax Rate			Ok	Back Sa	ve Layout	-				Addre		ated Referen		
Su	ppressOnPrint	ItemType	ItemCode I	Ŀ	-		6				nitCost	Markup	Discount	UnitSellingPrice	Base
Ŷ				Proces	ss 🔺 F	Format 🔺				2	-			-	-
•		Parts Internal S	147-888544	Drag a co							0.000		0.000	1,080.00	
		Parts	CL-100-965	CallRe	ference	Description			Status		15.000		0.000	10.80	_
*		Select typ		₽ # □C		18 0 0					15:000	0.000	0.000	10.00	~
				► CN000	00743	test			N						
		5		CN000	00744	1557788			N						
				CN000	00750	test			N						
4 =												_			+
0	comment Call to	confirm orde	er as well as the	P.O. numb	er for the Cus	tomer					Sub To			6,130.8	_
											`	AT		919.6	52
							Ψ.				Grand To	tal		7,050.4	12
Oper	Windows 🔻					Captu	ire screenshot.		User : Jula	andaK 1	19/03/2021	Version	2.4.0.11	Example Compar	ny //.

EDIT SALES ORDER ITEMS

1. **Suppress On Print Check Box:** Only click on the check box in the line of the item that you do **not** want printed on the Sales Invoice.

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

 Add Item line: On the next available line, click in the text box of the Item Type column. Refer to "Add Sales Order Items" on page 11 for details on how to complete the line item.



*				Edit Customer O	der - 0R0000326 - B	PO: Version	2.5.0.4 - Example	Company	v2.5.0.0					
Home	Equipment /	/Locations	Contract F	Finance / HR Inventor	y Maintenance / Pro	ojects Ma	nufacturing Pro	curement	Sales !	Service	Reporting	Utilities	- 1	₽ x
Save Back Dele Maintain	m Form	ayout Prin	Print	roforma oice			7							
Customer Name			٩				•				Billing ad			
Contact Name			CONTACT P	-			-				PO Box 1 New Tow		<u>^</u>	
Commercial	Julanda Kes			Order Date & Time	29/09/2021 • 1	4:22:52					Shinning	address	Ŧ	
Billing C Order Only C	lick on the	e line that	• م	Billing Contact Exchange Rate	Tarryn Snow CUSTOME	R CONTACT &					29 Dune New Tow Durban	Ave	<u>ب</u> م ۲	
you d	lo not wan	it printed	15.00 🗘								Addresses	Related Refer	ences	
SuppressOnPrint	7	ItemCode	ItemDescription			Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
P 🗉		* 0 ¢	n 🛛 c	8 🛛 c	R C	-	=	n 🗖 c	-	-	-	-	-	=
	Parts		K147 Black tone		Main Warehouse	3.000	0.000		0.000	0.000		360.000		
	Internal S	DEL	Delivery Fee	Delivery Fee		1.000	0.000		0.000	0.000	0.000	2,880.000		
 • • 	Parts Select typ.	CL-100-965	Cleaner	Cleaner	Main Warehouse	1.000	0.000		15.000	0.000	0.000	10.800	10.800) 15.(
٩	line. C	s the next a lick in the li to add the	tem Type											•
Comment					*						Sub Total		3,970	.80
											VAT		595	.62
					~					0	Grand Total		4,566	.42
Open Windows 🔻								User	: JulandaK	29/09/202	1 Version :	2.5.0.4 Examp	e Company v2.5.	.0.0 //

Delete Item line entry

- 1. To delete an item entry from the order, click in the **row** of the item that you wish to remove.
- 2. Click on **Delete Item**.

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

- 3. When you receive the **Confirm delete line** message to confirm;
 - Are you sure you want to remove this line from the order?
- 4. Click on **Yes** if you are certain about your selection, or
 - Click on **No** to ignore the request and leave the item line on the order.



٩	¥				Edit Customer O	rder - 0R0000326	- BPO: Version	2.5.0.4 - Example	Company	v2.5.0.0					x
	Home	Equipment /	/Locations	Contract	Finance / HR Inventor	ry Maintenance /	Projects Ma	anufacturing Pro	ocurement	Sales	Service	Reporting	Utilities	- 1	₽ X
s	ave Back Dele Iter Maintain		ayout Prin		Proforma ivoice										\$
	Customer Name	Big Bargains	s	م ر	 Reference 	B80004		•				Billing a	ddress		
	Contact Name Commercial			CONTACT P			14:22:52	:				PO Box 1 New Tow		<u>ب</u> ۲	
		Julanda Kes		-				_					address		
	Billing Customer			م	bining contool	Tarryn Snow CUSTON						29 Dune New Tow		<u>^</u> م	
	Order Currency		an Rand	-	Exchange Rate		1	•				Durban		Ŧ	
	Tax Rate			15.00 🗘								Addresse			
		ItemType	ItemCode	ItemDescripti				QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
<u>۲</u>		-	8 0 0	* 0 ¢	R C	R C	=	=		=	-	-	=	=	=
		Parts Internal S		K147 Black to Delivery Fee	ner K147 Black toner Delivery Fee	Main Warehouse	1.000			0.000			360.000		
		Parts	CL-100-965		Cleaner	Main Warehouse				15.000			2,880.000		
		Select typ													
					Confirm delete line 🔶	rou want to remove									
4					4	<u> </u>	(es	No							Þ
	Comment					*						Sub Total		3,970	.80
												VAT		595	.62
						Ψ.					0	Grand Total		4,566	.42
Op	en Windows 🔻								User	: JulandaK	29/09/202	1 Version :	2.5.0.4 Examp	le Company v2.5.	.0.0 //.

Edit Quantity, Discount and Unit Selling Price

 Make the relevant adjustments to the Quantity, Discount or Selling Price by typing in the new value or amount, or use the arrow indicators to adjust the value or amount.

SAVE SALES ORDER

2. When all the necessary changes have been made to the Sales Order, click on **Save** to return to the Sales Orders listing screen.



-	Ŧ				Edit Customer Order -	OR0000322 - BPC	: Version 2.4.0.	11 - Example Cor	npany					
	Home	Equipment / I	Locations (Contract Fir	nance / HR Inventory	Maintenance / Pro	jects Manufac	turing Procurem	ient Sales	Service	Reporting	g Utilities		₽ X
I	3 🗘 🎽	(9 6	9									
s	ave Back Dele				Proforma voice									
F	Maintain		nat d	Print	voice									
	Customer Name	_		م	Reference	220004		•						
	Contact Name										g address			
	Commercial				* Order Date & Time		13:37:10	7			Town		<u>^</u>	
		Julanda Kes		•	*	10/03/2021	15.57.10			Chin	ping addre		Ŧ	
	Billing Customer			م	* Dilling Contract	Tarryn Snow CUSTO					une Ave	:35	_ م	
	Order Currency			-	Exchange Rate	ranyn snow cosro	1 C			New	Town		*	
	Tax Rate			15.00 _	Excitative Race		1.					ated Referer		
				+						Addre		_		
	SuppressOnPrint	ItemType	ItemCode	ItemDescriptio	on OrderLineDescription	WarehouseNam	e Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount —	UnitSellingPric	e Base
ľ				-		-	_		_				-	
ľ		Parts Internal S		K147 Black to Delivery Fee	Ner K147 Black toner Delivery Fee	Main Warehous	e 3.000 1.000	0.000		0.000		10.000		
\vdash		Parts	CL-100-965		Cleaner	Main Warehous		0.000		15.000				.800
		Select typ	CL-100-903	Cleaner	Ciedilei	Main Warehous	- 1.000	0.000	,	15.000	0.000	0.000	10.	000
4	Comment Call to	confirm orde	er as well as th	e P.O. number	for the Customer	A 				Sub To Grand To	VAT		5,806 871 6,677	1.02
0	oen Windows 🔻							User	: JulandaK	19/03/2021	Version	: 2.4.0.11	Example Comp	any

Related Topics

- Add a Sales Order
- Print / Email Sales Order
- Print Pro-Forma Invoice
- <u>Create Sales Invoice from Sales Order</u>
- <u>Create New Deal Sale / Rental (creates a call)</u>
- Create New Deal Project Sale / Rental

MNU.126.002