

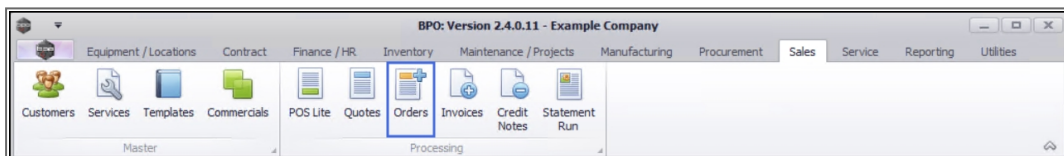
We are currently updating our site; thank you for your patience.

SALES

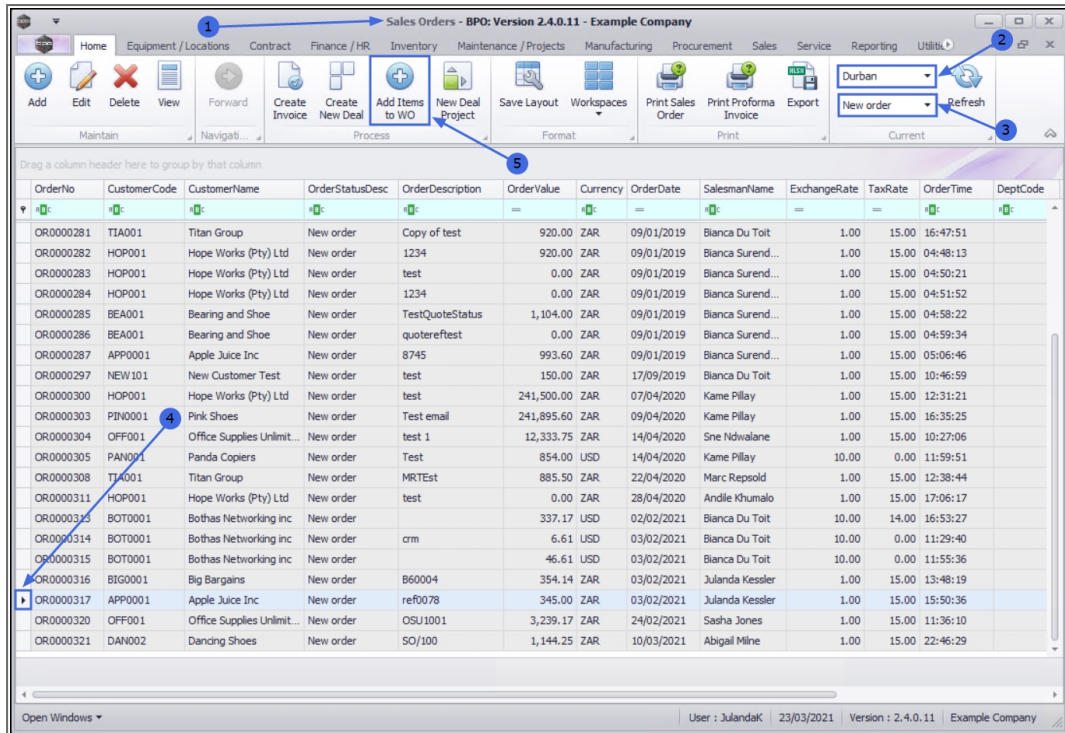
ORDERS – ADD ITEMS TO WORK ORDER

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'.

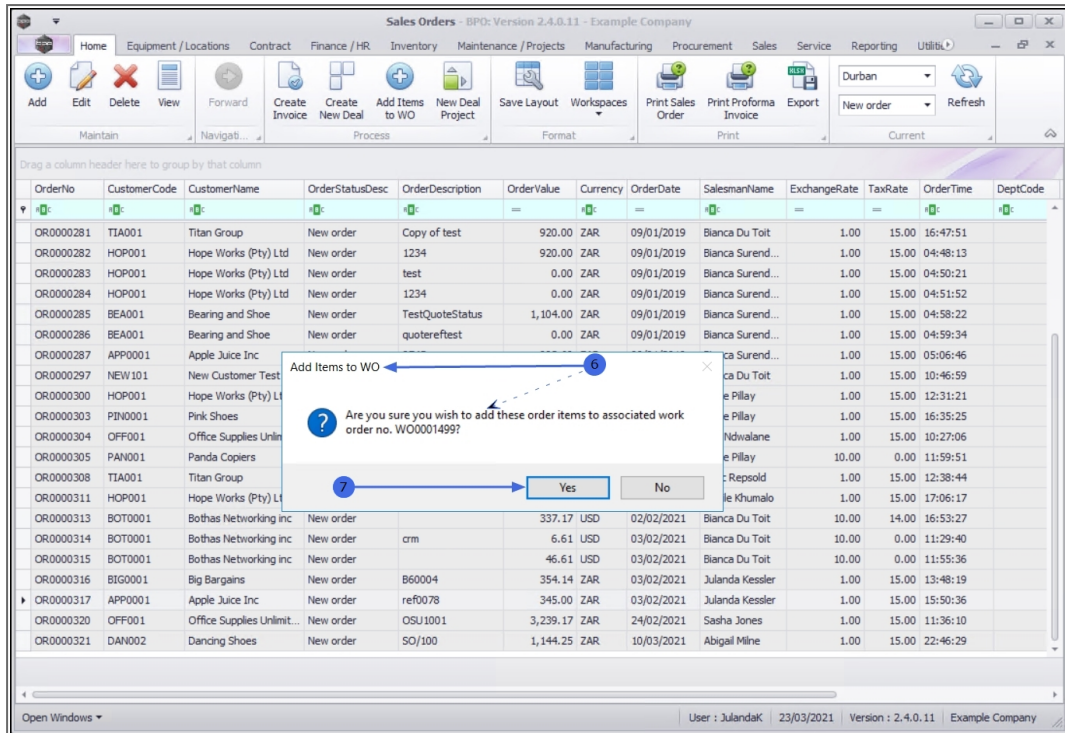
Ribbon Access: Sales > Orders



1. The **Sales Orders** listing screen will be displayed.
2. Select the **Site** where the Sales Order can be located.
 - The example has **Durban** selected.
3. The **Status** must be set to **New Order**.
4. Click on the **row** of the **sales order** for which you wish to **add items** to the work order.
5. Click on **Add Items to WO**.



6. 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**[work order number]?
7. Click on **Yes**, if you are certain about your selection,



The Sales Order items have been added to the linked Work Order.

Related Topics

- [Add a Sales Order](#)
- [Edit / Delete / View a Sales Order](#)
- [Print / Email Sales Order](#)
- [Print Pro-Forma Invoice](#)
- [Create Sales Invoice from Sales Order](#)
- [Create New Deal Project Sale / Rental](#)

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