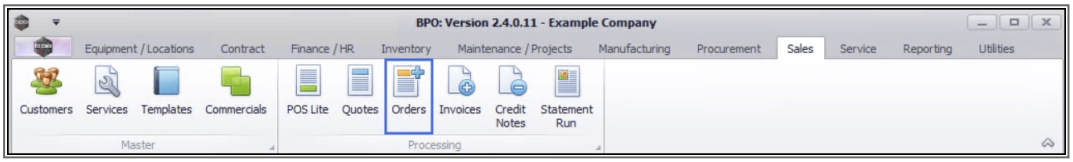
We are currently updating our site; thank you for your patience.

SALES

ORDERS – VIEW SALES ORDER

Ribbon Access: Sales > Orders



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

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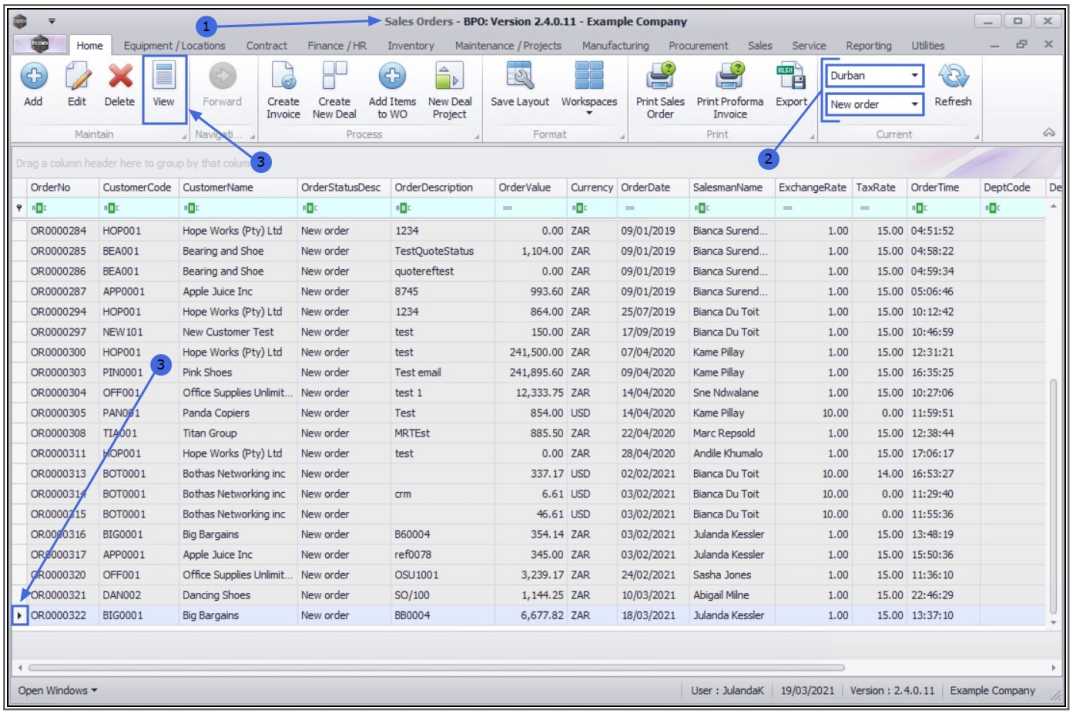

5. The **View Customer Order - OR[**Order Number**]** screen will display.

> 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.

6. You can however Orders - Print Sales Order or Orders - Print Proforma Invoice from this screen.
7. Click on **Back** to return to the Sales Orders listing screen.

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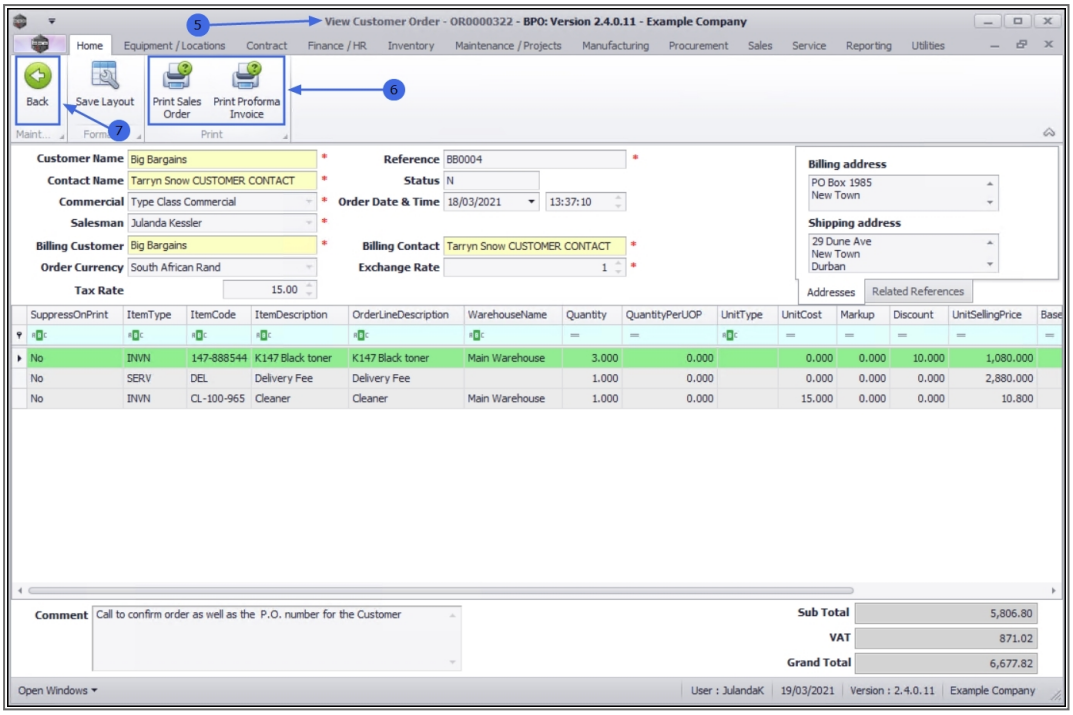

FORWARD NAVIGATION BUTTON

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.

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

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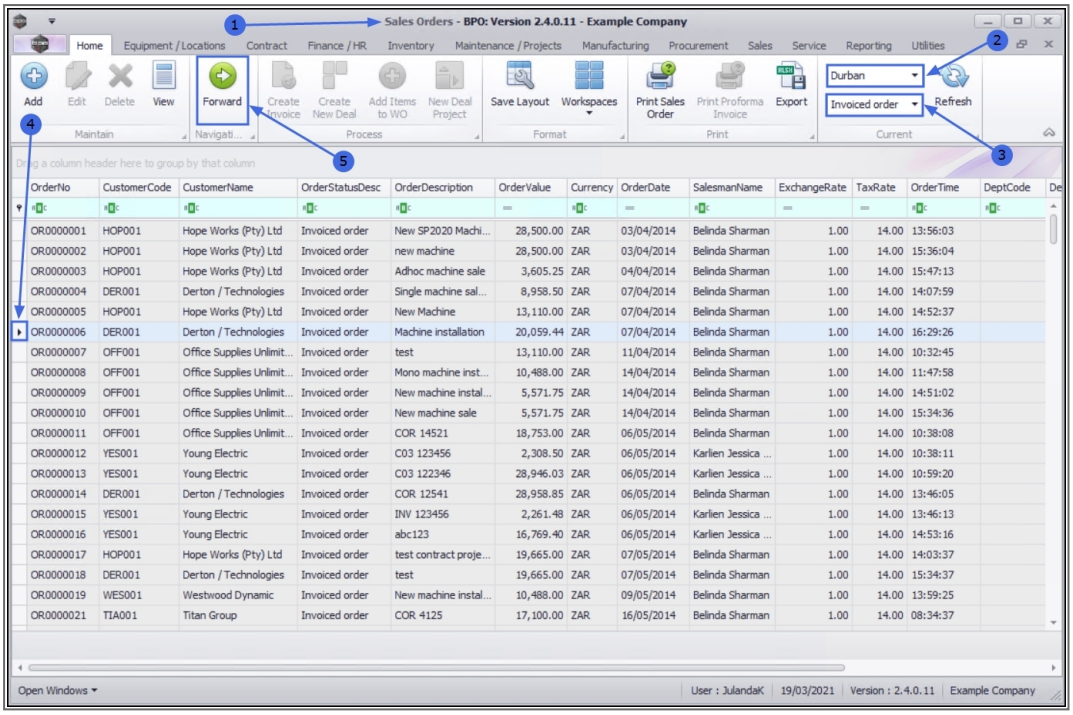

6. The ***Edit project : PRJ[ ]*** screen will open as the selected Sales Order is linked to a Project.

> 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.

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

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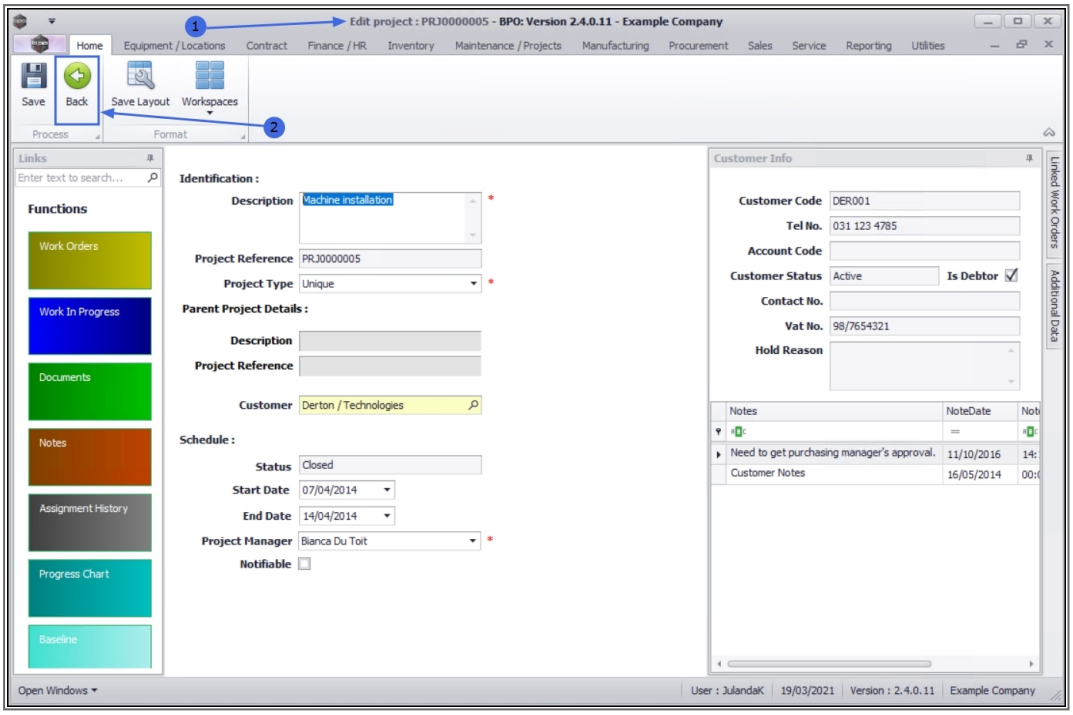

Related Topics

- Add a Sales Order
- Print / Email 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

MNU.126.010

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