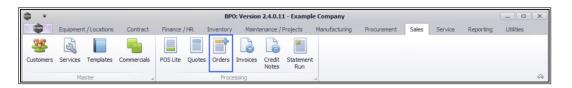


We are currently updating our site; thank you for your patience.

# **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.



#### Orders - View Sales Order

G	Home	Equipment	/Locations Contract	Finance / HR	Inventory Mainte	nance / Projects	Manufa	ecturing Pro	curement Sales	Service F	Reporting Dan	• C	- 8	)
Ad	ld Edit	Delete View	Forward Creat		Items New Deal WO Project	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice		order		1	
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			p by that colum 3						2					
(	OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	
P	0¢	1 <b>0</b> 0	10×	* <b>0</b> ¢	100	-	a C		10c	-	-	a 🛛 c	A C	
(	R0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
(	R0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
(	R0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
(	R0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
(	R0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42		
(	R0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
(	R0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
(	R0000303	PIN0001 3	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
(	R0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
(	R0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
(	R0000308	TI4001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
(	R0000311	OP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
0	R0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
(	R000031	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
(	R0000715	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
(	0R0000316	BIG0001	Big Bargains	New order	B60004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
(	R0000317	APP0001	Apple Juice Inc	New order	ref0078	345.00	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	15:50:36		
5	R0000320	OFF001	Office Supplies Unlimit	New order	OSU1001	3,239.17	ZAR	24/02/2021	Sasha Jones	1.00	15.00	11:36:10		
	R0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		
	R0000322	BIG0001	Big Bargains	New order	BB0004	6,677.82	ZAR	18/03/2021	Julanda Kessler	1.00	15.00	13:37:10		

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.



-	Ŧ		5		View Customer Orde	r - OR0000322 - BPC	0: Version 2.4.0	.11 - Exampl	e Company					x
1	Home	Equipment /	Locations (	Contract Fi	nance / HR Inventory	Maintenance / Proj	jects Manufa	turing Prod	urement Sale	s Service	Reporting	) Utilities	_ 8	×
L	Back int	ut Print S Ord			6									â
	Customer Name	Big Bargain	s		<ul> <li>Reference</li> </ul>	e 880004		•		Billin	g address			
	Contact Name	Tarryn Sno	W CUSTOMER	CONTACT	* Statu	s N					lox 1985		*	
	Commercial	Type Class	Commercial		* Order Date & Tim	e 18/03/2021 🔹	13:37:10			New	Town		-	
	Salesman	Julanda Ke	ssler	~	•						ping addre	55		
	Billing Customer	Big Bargain	s		<ul> <li>Billing Contact</li> </ul>	t Tarryn Snow CUSTO	MER CONTACT	•			une Ave Town		*	
	Order Currency	South Afric	an Rand	Ψ.	Exchange Rat	e	1	•		Durb	an		*	
	Tax Rate			15.00 🤤						Addre	esses Rel	ated Referer	nces	
	SuppressOnPrint	ItemType	ItemCode	ItemDescription			e Quantity	QuantityPerU		UnitCost	Markup	Discount	UnitSellingPrice	Base
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	No	INVN	CL-100-965	Cleaner	Cleaner	Main Warehouse	e 1.000		0.000	15.000	0.000	0.000	10.80	.0
•														Þ
	Comment Call to	confirm orde	er as well as th	e P.O. number	r for the Customer	*				Sub To	tal		5,806.8	.0
										,	/AT		871.0	2
						-				Grand To	otal		6,677.8	2
0	en Windows 🔻								User : JulandaK	19/03/2021	Version	2.4.0.11	Example Compar	ny /

### FORWARD NAVIGATION BUTTON

The *Forward* navigation button is only available in the <u>Invoiced Order</u> 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*.



#### Orders - View Sales Order

1	Hom	e Equipment	/Locations Contract	Finance / HR	Inventory Mainten	ance / Projects	Manufa	acturing Pro	curement Sales	_	Reporting	Utilities	2 @	
Ad		Delete View	Forward Creat		Items New Deal	Save Layout V	Vorkspaces	Print Sales Order	Print Proforma	Export Inv	ban oiced order	Refrest		
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Ŧ	Pidin	Lalii I	a Navigau a			Format		4	Princ	4	Currer		3	
X				5										
C	orderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	
8	O C	x C	# 🗖 c	n∎c	a 🗖 c	-	s <b>O</b> c	.=	R C	-	-	#IC	.a∎c	
C	R0000001	HOP001	Hope Works (Pty) Ltd	Invoiced order	New SP2020 Machi	28,500.00	ZAR	03/04/2014	Belinda Sharman	1.00	14.00	13:56:03		
C	R0000002	HOP001	Hope Works (Pty) Ltd	Invoiced order	new machine	28,500.00	ZAR	03/04/2014	Belinda Sharman	1.00	14.00	15:36:04		
C	R000003	HOP001	Hope Works (Pty) Ltd	Invoiced order	Adhoc machine sale	3,605.25	ZAR	04/04/2014	Belinda Sharman	1.00	14.00	15:47:13		
C	R000004	DER001	Derton / Technologies	Invoiced order	Single machine sal	8,958.50	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	14:07:59		
C	R0000005	HOP001	Hope Works (Pty) Ltd	Invoiced order	New Machine	13,110.00	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	14:52:37		
c	R0000006	DER001	Derton / Technologies	Invoiced order	Machine installation	20,059.44	ZAR	07/04/2014	Belinda Sharman	1.00	14.00	16:29:26		
C	R0000007	OFF001	Office Supplies Unlimit	Invoiced order	test	13,110.00	ZAR	11/04/2014	Belinda Sharman	1.00	14.00	10:32:45		
C	R0000008	OFF001	Office Supplies Unlimit	Invoiced order	Mono machine inst	10,488.00	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	11:47:58		
C	R0000009	OFF001	Office Supplies Unlimit	Invoiced order	New machine instal	5,571.75	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	14:51:02		
C	R0000010	OFF001	Office Supplies Unlimit	Invoiced order	New machine sale	5,571.75	ZAR	14/04/2014	Belinda Sharman	1.00	14.00	15:34:36		
C	R0000011	OFF001	Office Supplies Unlimit	Invoiced order	COR 14521	18,753.00	ZAR	06/05/2014	Belinda Sharman	1.00	14.00	10:38:08		
C	R0000012	YES001	Young Electric	Invoiced order	C03 123456	2,308.50	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	10:38:11		
C	R0000013	YES001	Young Electric	Invoiced order	C03 122346	28,946.03	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	10:59:20		
C	R0000014	DER001	Derton / Technologies	Invoiced order	COR 12541	28,958.85	ZAR	06/05/2014	Belinda Sharman	1.00	14.00	13:46:05		
C	R0000015	YES001	Young Electric	Invoiced order	INV 123456	2,261.48	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	13:46:13		
C	R0000016	YES001	Young Electric	Invoiced order	abc123	16,769.40	ZAR	06/05/2014	Karlien Jessica	1.00	14.00	14:53:16		
C	R0000017	HOP001	Hope Works (Pty) Ltd	Invoiced order	test contract proje	19,665.00	ZAR	07/05/2014	Belinda Sharman	1.00	14.00	14:03:37		
C	R0000018	DER001	Derton / Technologies	Invoiced order	test	19,665.00	ZAR	07/05/2014	Belinda Sharman	1.00	14.00	15:34:37		
C	R0000019	WES001	Westwood Dynamic	Invoiced order	New machine instal	10,488.00	ZAR	09/05/2014	Belinda Sharman	1.00	14.00	13:59:25		
	R0000021	TIA001	Titan Group	Invoiced order	COR 4125	17,100.00	ZAR	16/05/2014	Belinda Sharman	1.00	14.00	08:34:37		

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.



• •	1	Edit p	roject : PRJ00	000005 - BPO: Version	2.4.0.11 - Examp	le Company				
Home Equipment	t / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procuremen	t Sales Ser	rice Reporting Util	ties —	в×
	t Workspaces									۵
Links #						C	ustomer Info			* 5
Enter text to search P	Identification :									ked 1
Functions	Description	Machine installat	ion	· · ·			Customer Co	e DER001		Nork
				-			Tel I	o. 031 123 4785		Linked Work Orders
Work Orders	Project Reference	PRJ000005					Account Co	le		
	Project Type	Unique		• •			Customer Stat	Is Active	Is Debtor	N Add
Work In Progress	Parent Project Detail	5:					Contact	0.		Additional Data
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Documents	Project Reference									-
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Notes		Classed				•	Need to get purc	nasing manager's approva	l. 11/10/2016	14:
	Status Start Date		-				Customer Notes		16/05/2014	00:0
Assignment History		14/04/2014	-							
	Project Manager		•	• *						
	Notifiable			•						
Progress Chart	notinable	-								
Baseline										
						4				
Open Windows 👻								2021 Version : 2.4.0.1	1 Example Cor	npany

#### **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.126.010