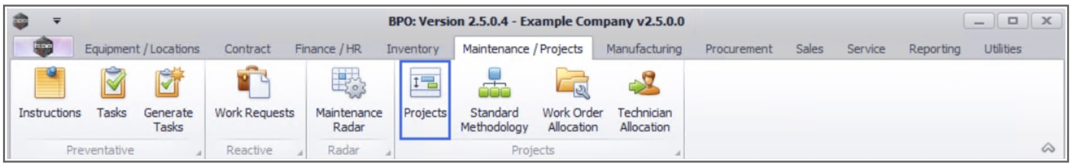
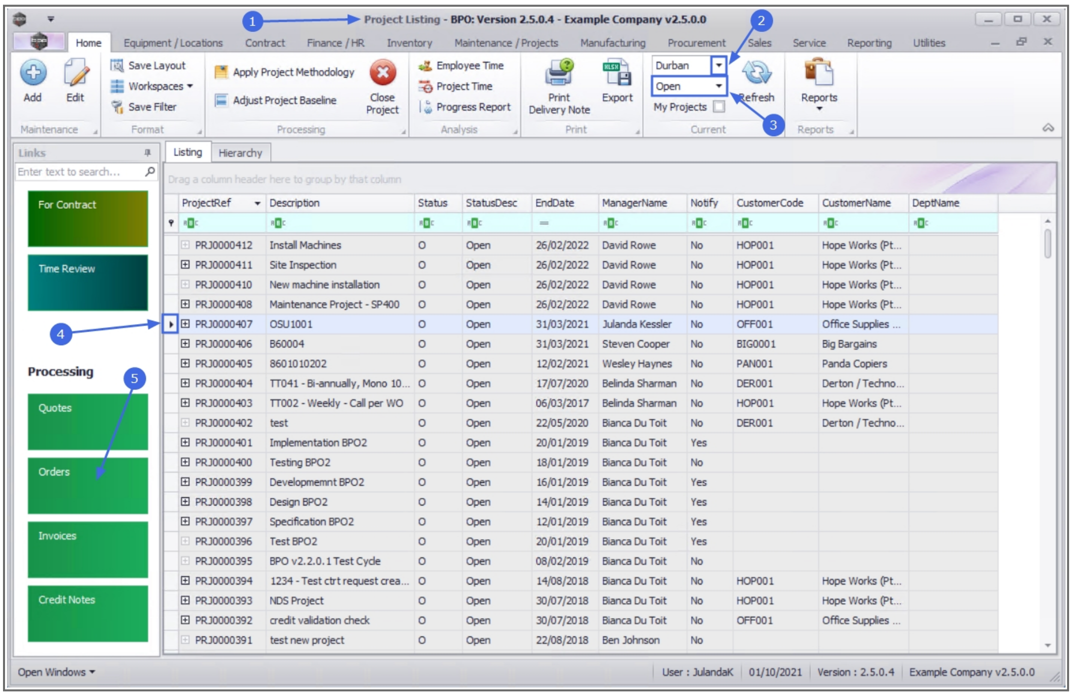
PROJECTS

PROJECTS – SALES ORDERS

Ribbon Access: *Maintenance / Projects > Projects*



1. The ***Project Listing*** screen will be displayed.
2. Select the ***Site*** where the project can be located.
    - The example has ***Durban*** selected.
3. Ensure that the ***Status*** has been set to ***Open***.
4. Click on the ***row*** of the ***project*** you wish to create a sales order for.
5. Click on the ***Orders*** tile.



6. The ***Sales Orders for Project PRJ****[project code]* screen will be displayed.

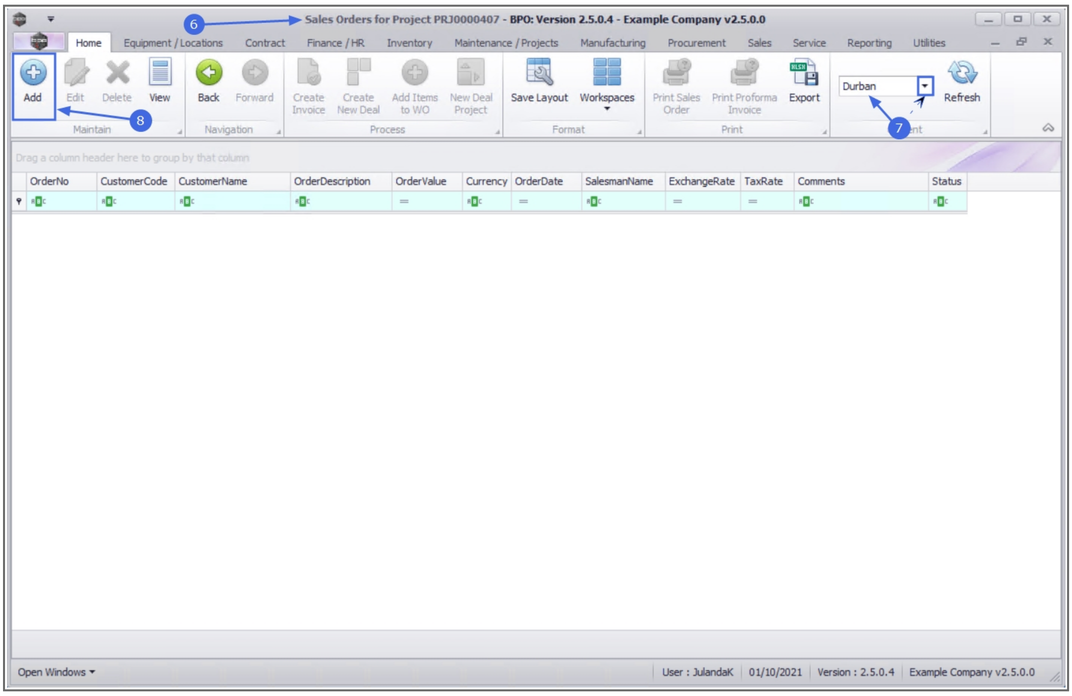
> The *Site* from the Customer Listing screen will not automatically pull through to the *Sales Orders for Project* screen.

7. Click on the **arrow** to change the ***Site*** filter.
    - The ***Sales Orders for Project*** listing screen will be updated with the Project Orders for the selected site.

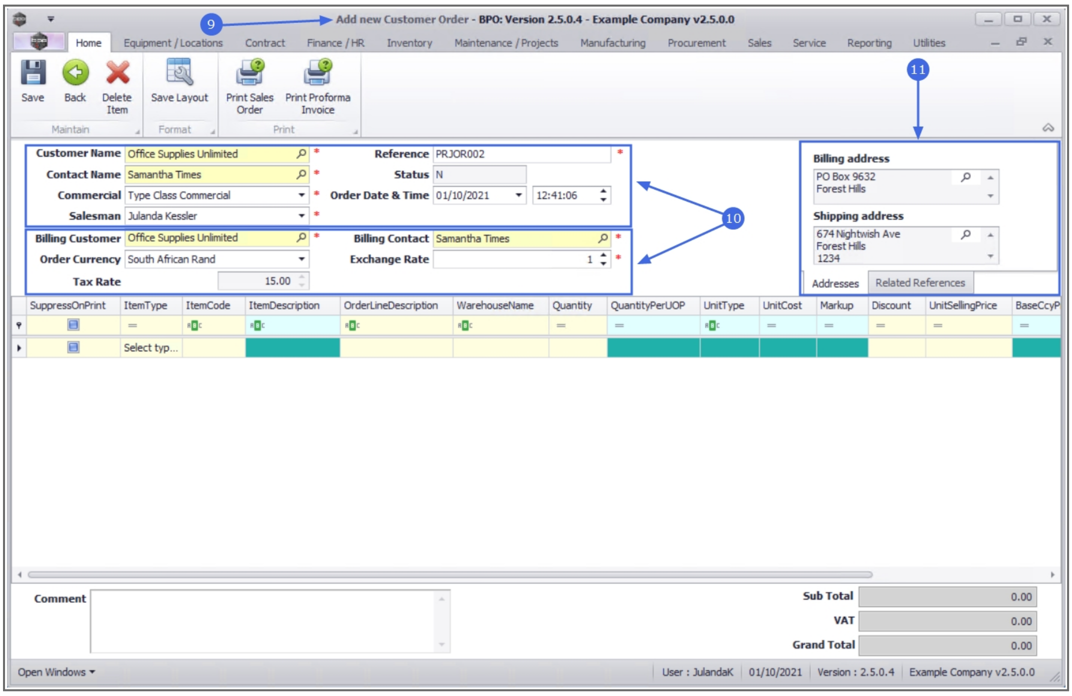
CREATE SALES ORDER

8. Click on ***Add***.

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



9. The ***Add new Customer Order*** screen will be displayed.
10. Complete the ***Sales Order Header*** and the ***Financial Header*** Information.
11. Confirm the ***Billing and Shipping Addresses*** for the customer, if these fields were not auto populated when you entered the order header information.

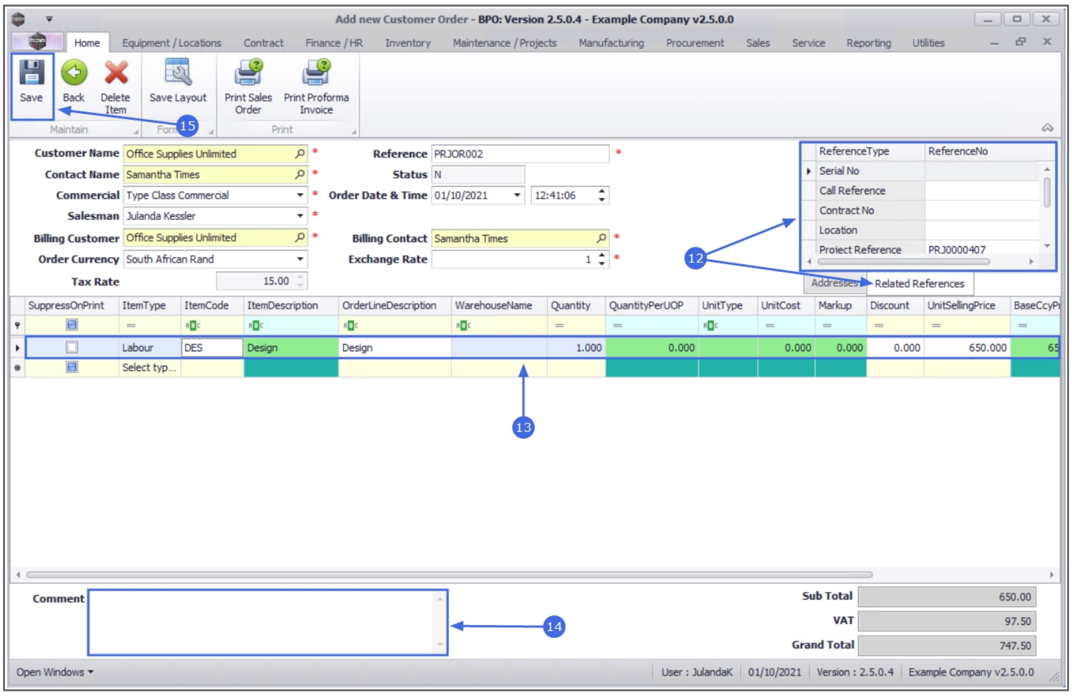


RELATED REFERENCES

12. Click on the ***Related References*** tab to link the reference information for the customer Order.
    - The Project References field will be auto linked with the selected Project Reference Number.

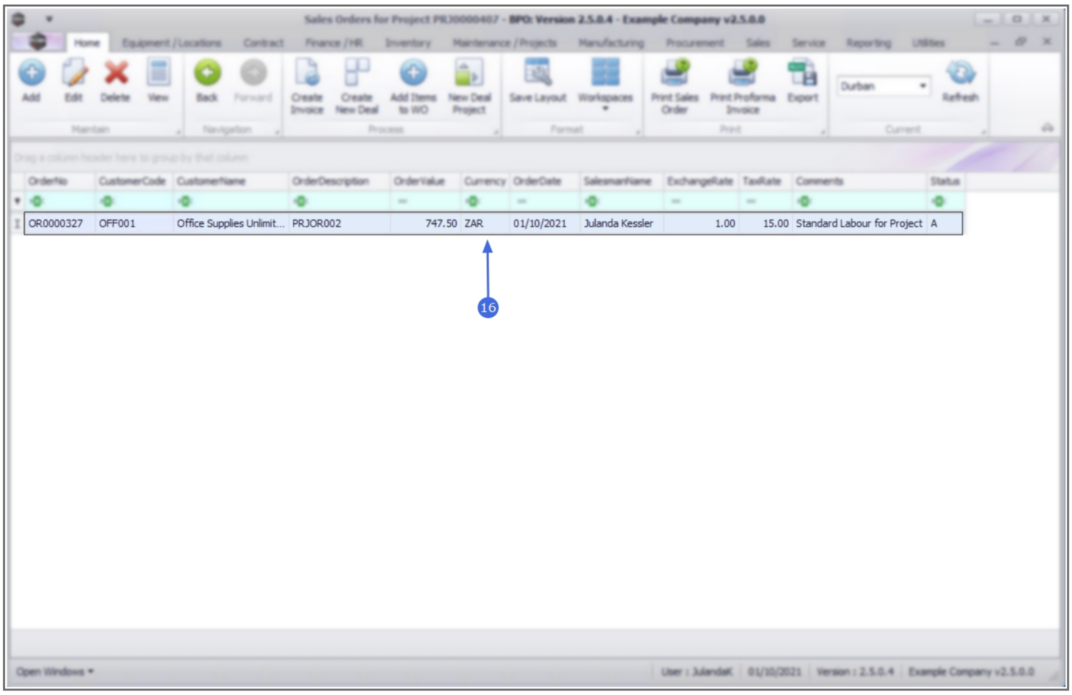
LINE ITEMS AND COMMENTS

13. " Add Sales Order Items" on page 11 as required.
14. Click in the ***Comments text box*** to type a comment related to the Order.
15. Click on ***Save*** to save the customer Order.



16. The ***Sales Orders for Customer*** listing screen will be updated with the new Order that you have created.

For a detailed handling of this topic refer to Orders - Add Sales Order

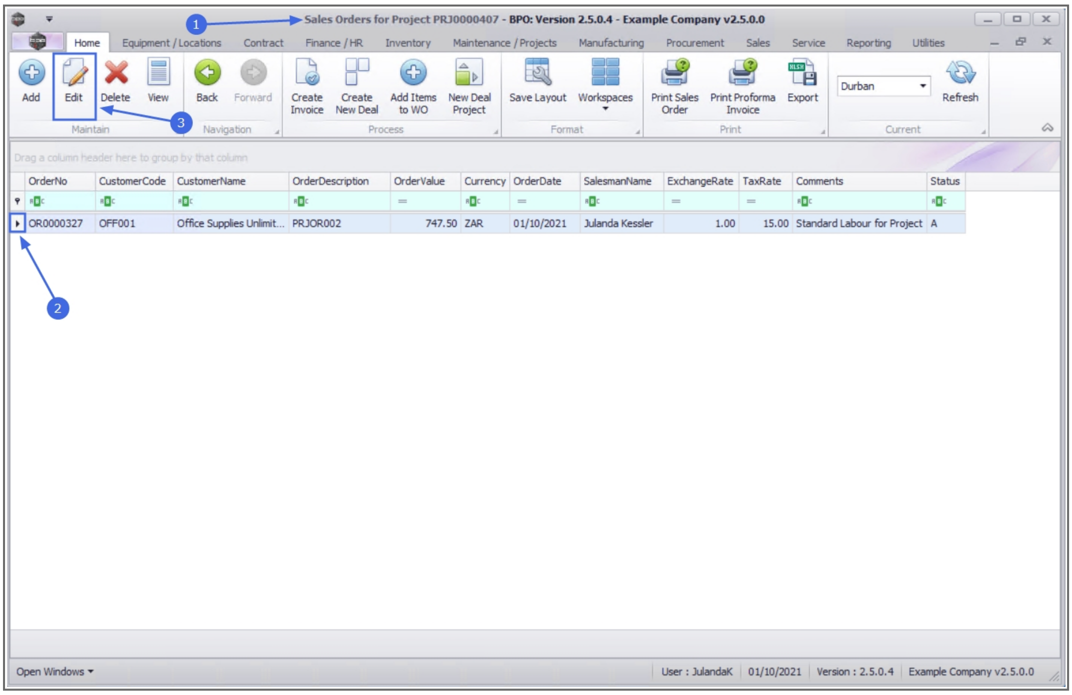


EDIT SALES ORDER

Note that Sales Orders that have already been invoiced will not be available for editing.

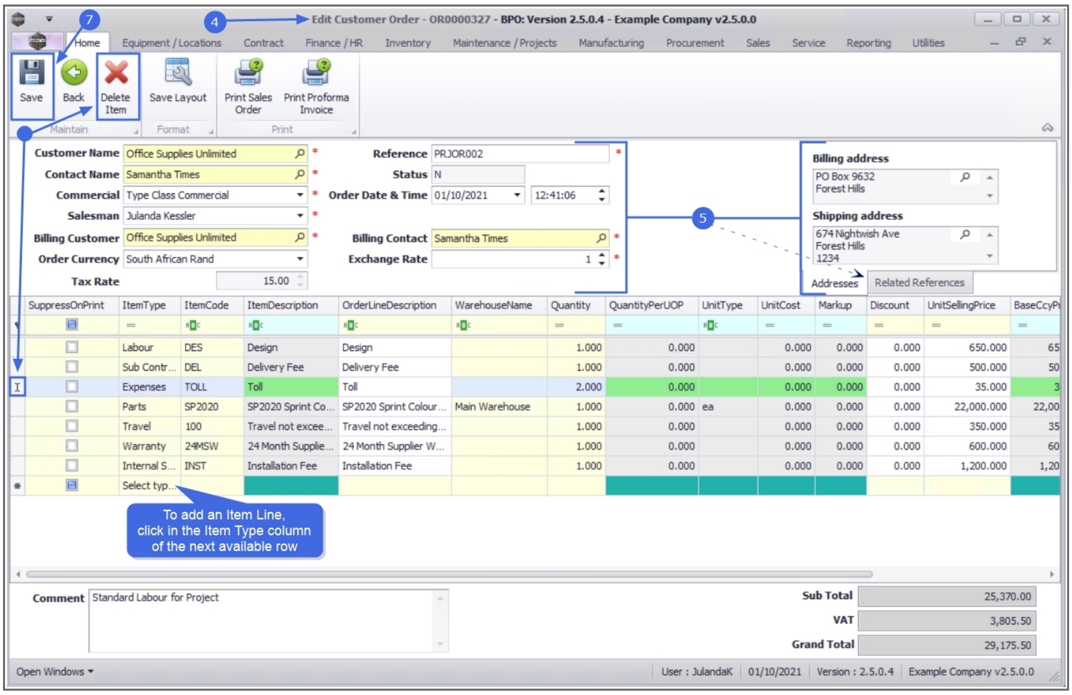
1. From the ***Sales Orders for Customer [****Customer Code****]*** listing screen,
2. Click in the ***row*** of the Sales Order you wish to edit.
3. Click on ***Edit***.

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



4. The ***Edit Customer Order - OR[****Order Number****]*** listing screen will display.
5. Make the required changes to the ***Heading Information***, ***Addresses*** or ***Related References tabs***.
6. Make the necessary changes to the Order Item frame:
    - To " Add Sales Order Items" on page 11, click in the Item Type column of the next available row.
    - To "Delete Item line entry" on page 8, click on the ***row*** of the item you wish to remove, then click on ***Delete Item***.
7. Click on ***Save*** to save the changes to the Customer Order and return to the ***Sales Orders for Customer*** screen.

For a detailed handling of this topic refer to Orders - Edit Sales Order



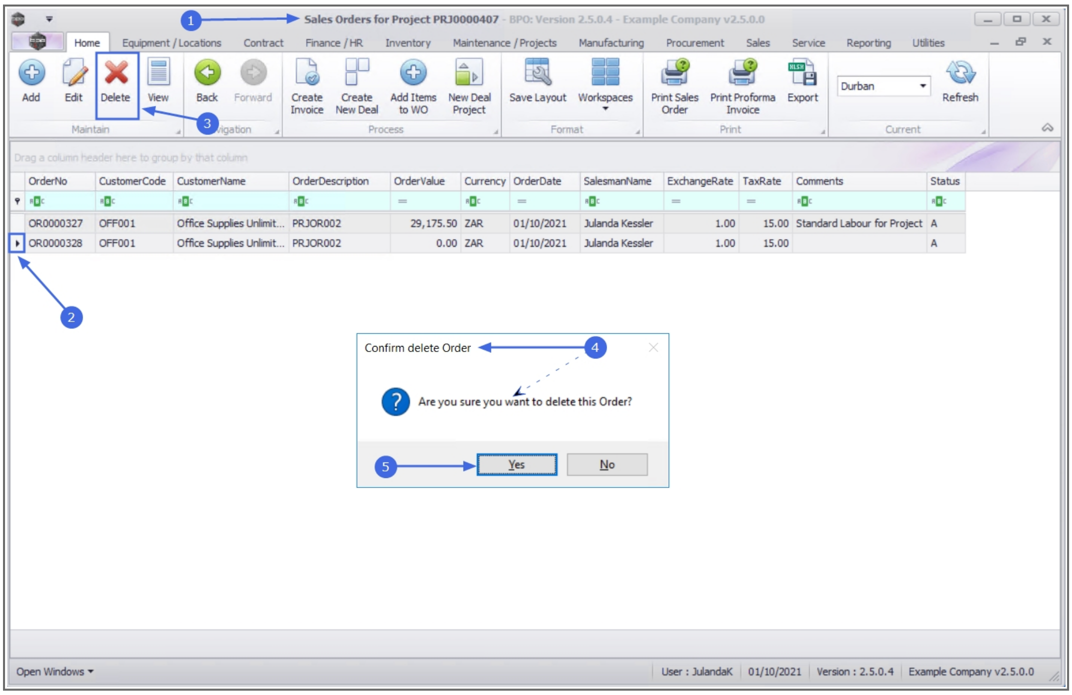
DELETE SALES ORDER

Note that Orders that have already been invoiced will not be available for deletion.

1. From the ***Sales Orders for Customer: [****Customer Code****]*** listing screen,
2. Click on to the ***row*** of the Sales Quote you wish to ***remove***.
3. Click on ***Delete***.

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

4. The ***Confirm delete Order*** message will display;
   - ***Are you sure you want to delete this Order?***
5. Click on ***Yes***.



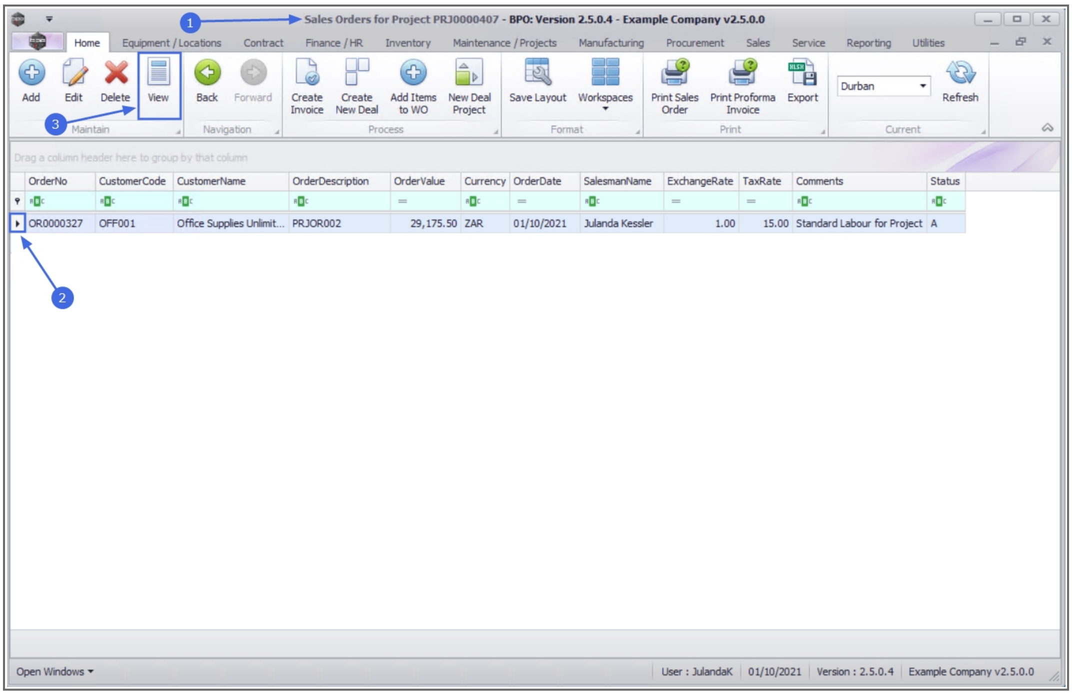
The Sales Order will be ***removed*** from the ***Sales Orders for Customer*** listing screen.

For a detailed handling of this topic refer to Orders - Delete Sales Order

VIEW CUSTOMER ORDER

An Order can be *viewed* in <u>any</u> status.

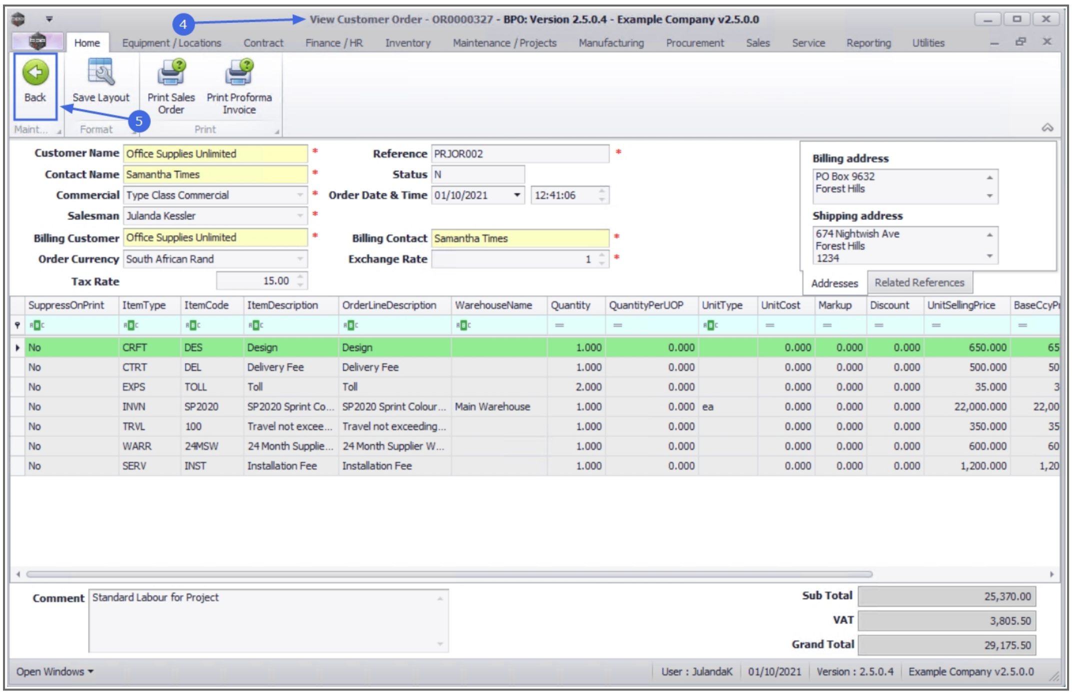
1. From the ***Sales Orders for Customer: [****Customer Code****]*** listing screen
2. Click on the ***row*** of the Sales Order that you wish to ***view***.
3. Click on ***View***.



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

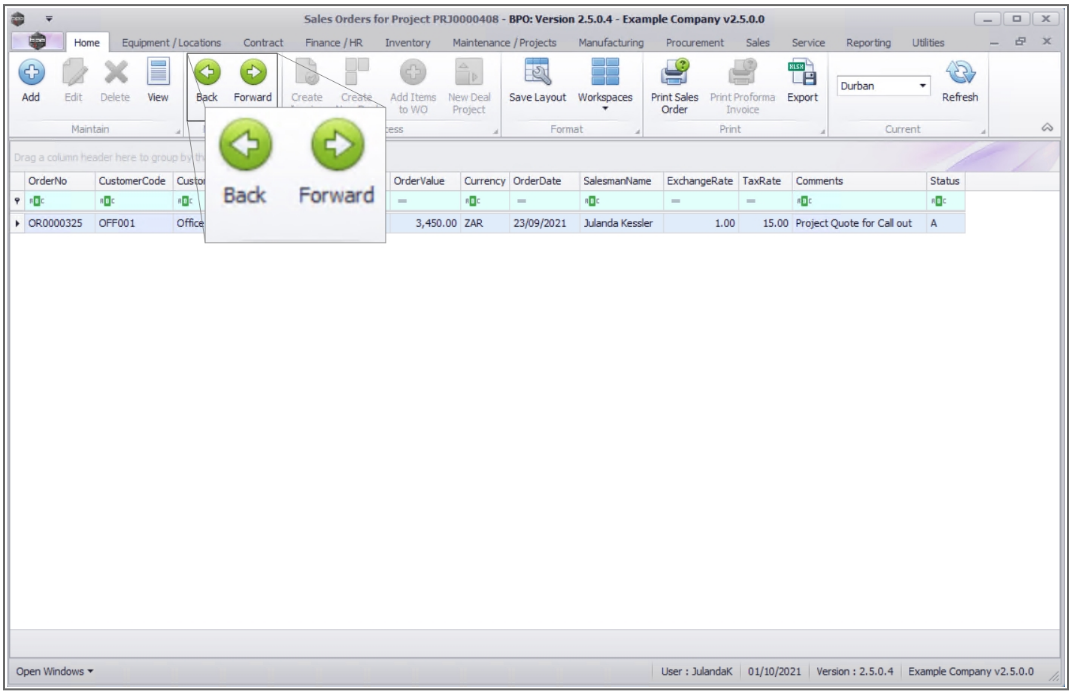
> No changes can be made to the information on the Order as this is a view only screen.

5. Click on ***Back*** to return to the ***Sales Orders for Customer*** listing screen.



ORDER NAVIGATION BUTTONS

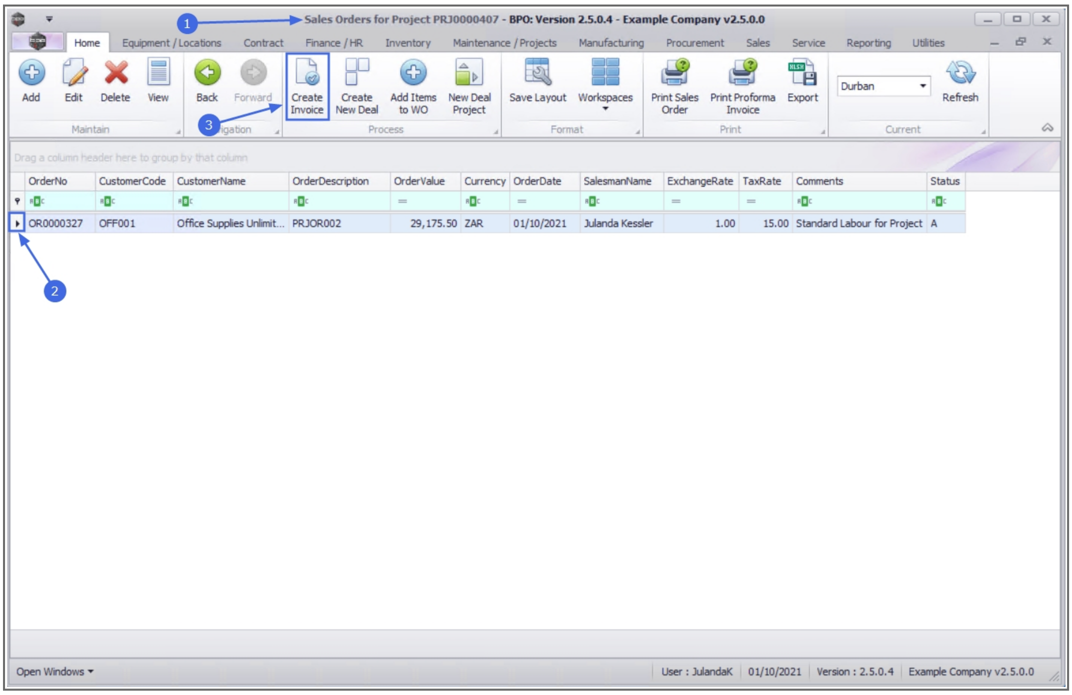
- The ***Forward*** navigation button, is only available in the '**[I] - Invoiced**' Order Status. This allows for quick navigation to the related documentation by navigating to any downstream process documents related to the selected Sales Order, e.g. the linked Sales Invoice or the related new deal Call.
- The ***Back*** navigation button will transport you back to the ***Customer Listing*** screen.



CREATE INVOICE

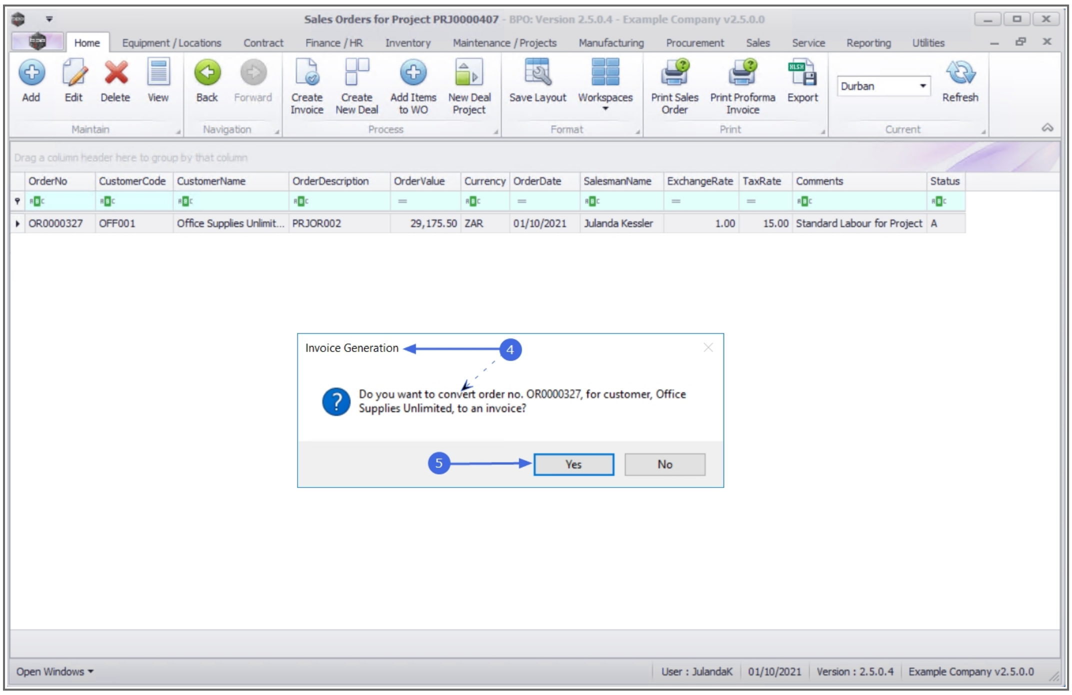
1. From the ***Sales Orders for Customer** [Customer Code]* screen,
2. Select the ***row*** of the Sales Order you wish to ***create an invoice*** for.
3. Click on ***Create Invoice***.

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

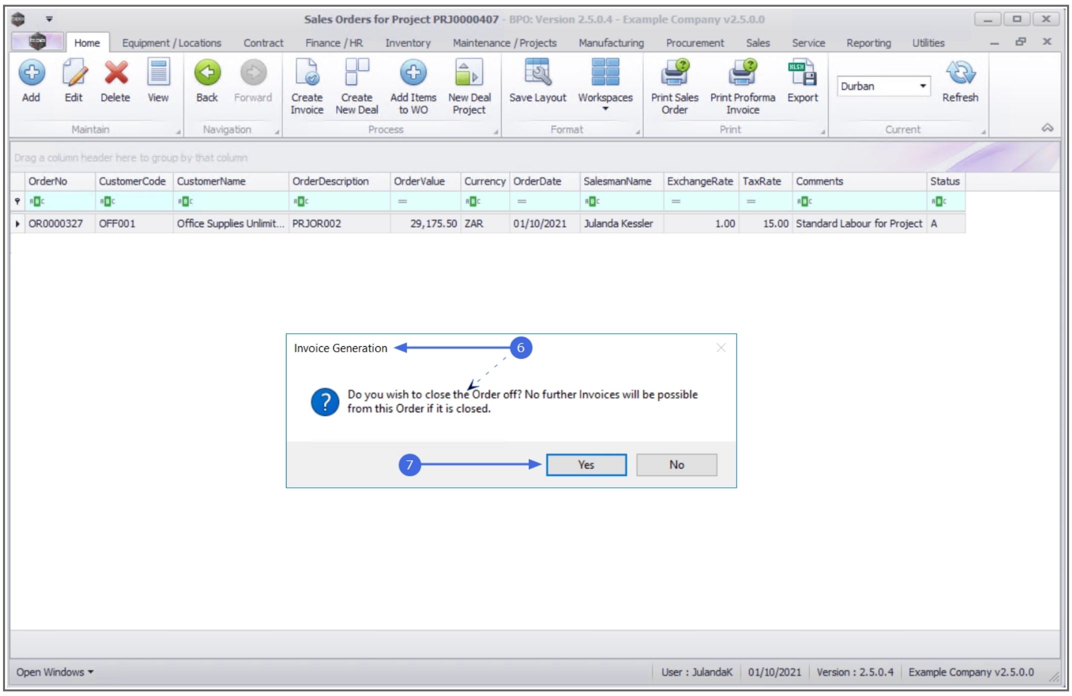


You will receive three (**3**) ***Invoice Generation*** prompt messages:

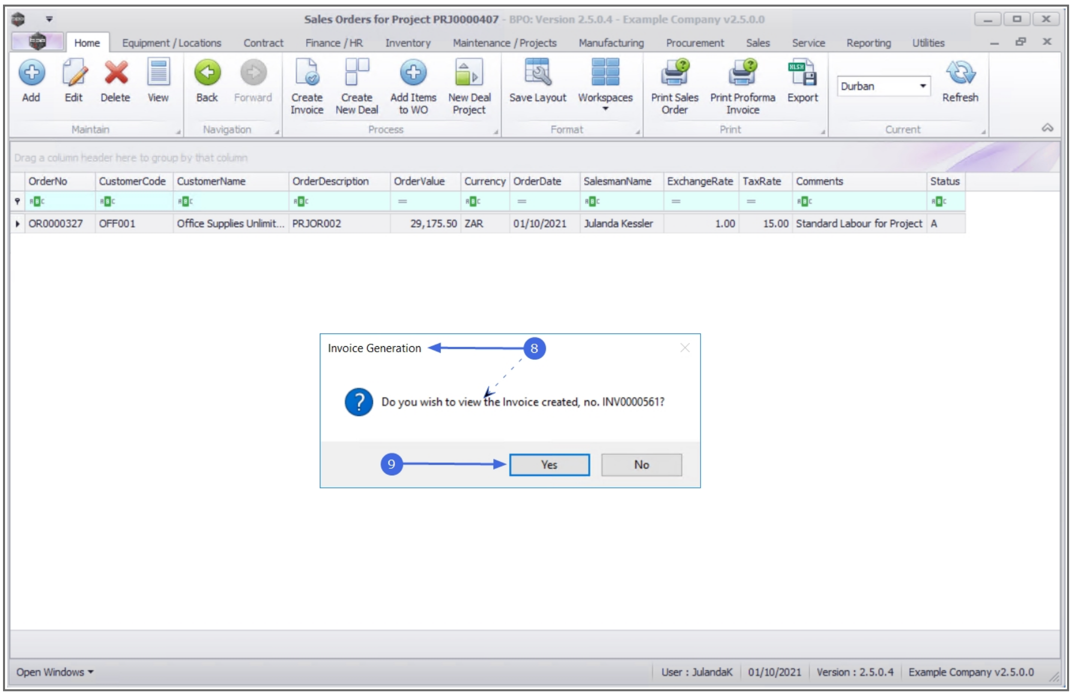
4. The first ***Invoice Generation*** message will confirm;
   - ***Do you want to convert order no. OR[****order number****], for customer, [****customer name****], to an invoice?***
5. Click on ***Yes***, *if you are certain about your selection.*



6. The second ***Invoice Generation*** message will confirm;
    - ***Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.***
7. Click on ***Yes***.

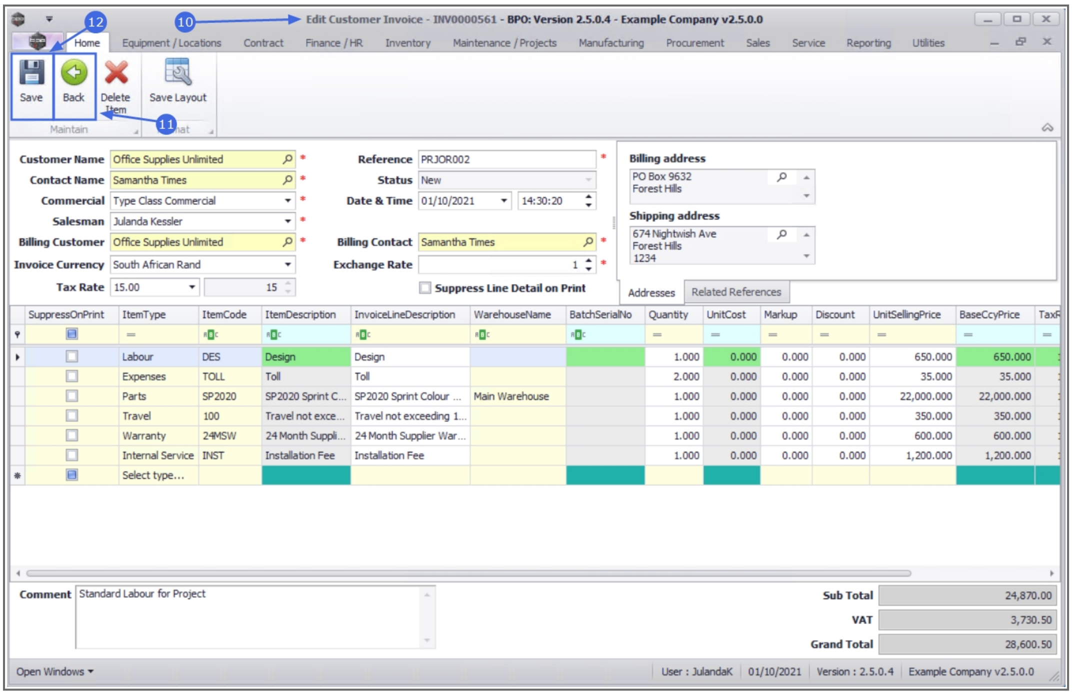


8. When you receive the third ***Invoice Generation*** message requesting;
    - ***Do you wish to view the Invoice created, no INV[****invoice number****]?***
9. Click on ***Yes*** to view the Invoice.
    - Click on ***No*** to return to the ***Sales Orders for Customer*** screen.



10. The ***Edit Customer Invoice*** screen will display. From here you can view or make changes to the Invoice, if required.
11. Click on ***Back*** to return to the ***Sales Orders for Customer*** screen, or
12. Click on ***Save*** if you have made changes to the Invoice.

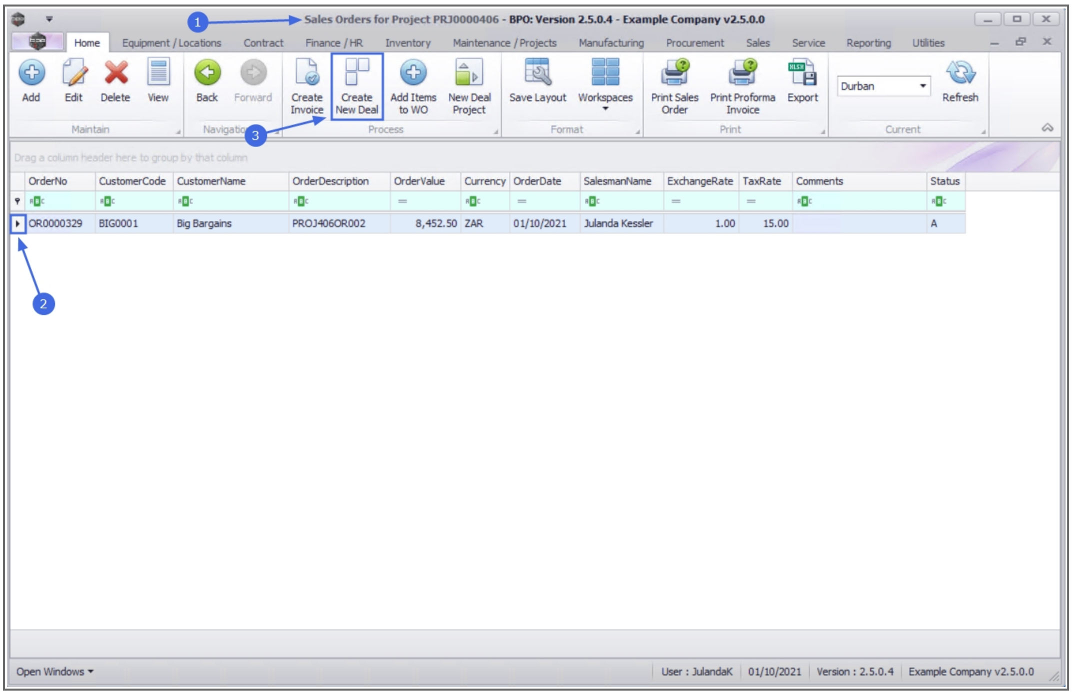
For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



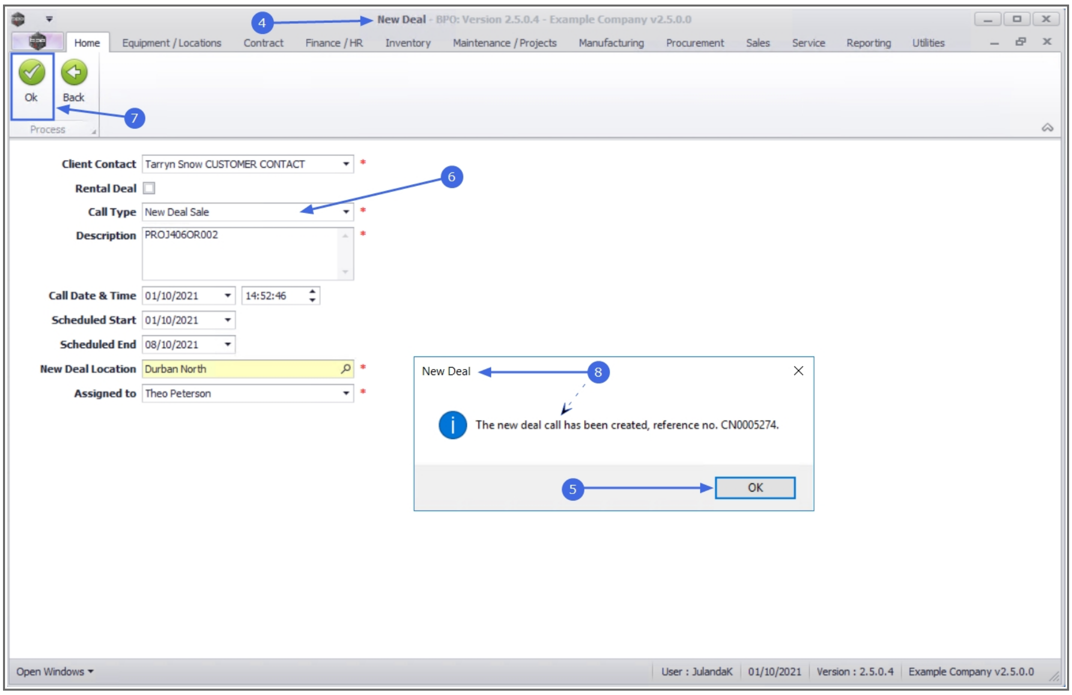
CREATE NEW DEAL

1. From the ***Sales Orders for Customer [****customer code****]*** screen,
2. Select the ***row*** of the Order you wish to create a New Deal for.
3. Click on ***Create New Deal***.

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



4. "The New Deal screen will be displayed." on page 3
5. Complete the New Deal information as required.
6. The ***Call Type*** field enables you to distinguish if this order is a New Deal Sale or New Deal Rental.
7. When you have completed the new deal information, click on ***OK***.
8. The ***New Deal*** message will confirm that;
    - ***The new deal call has been created, reference no. [****CN number****]***
9. Click on ***OK***.



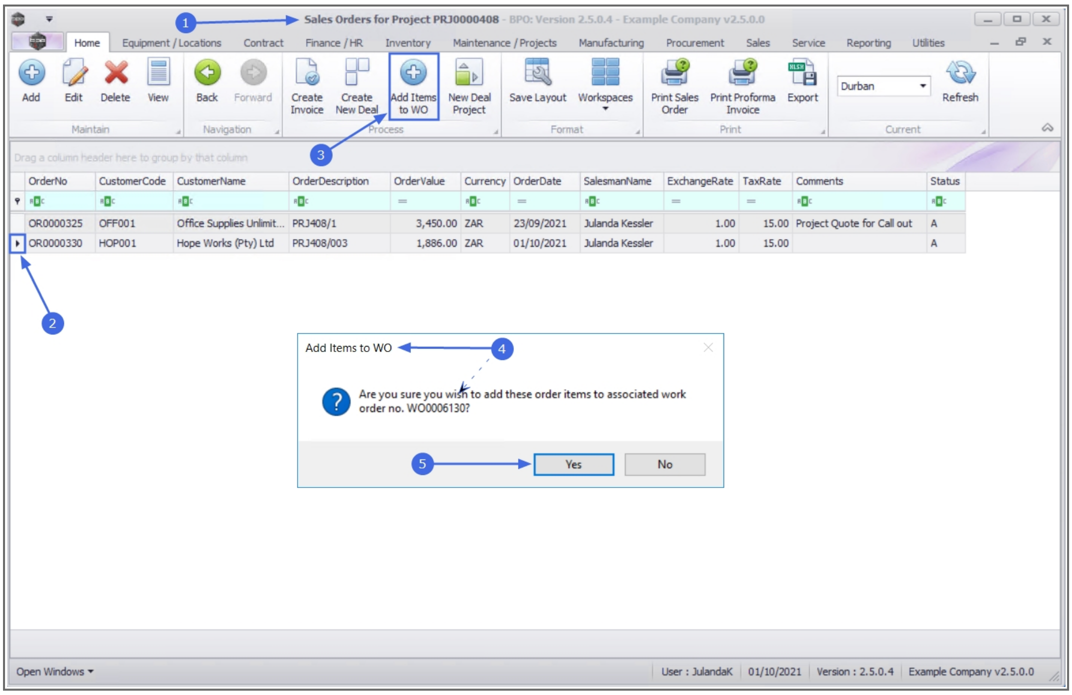
ADD ITEMS TO WORK ORDER

The *Add Items to WO* function is only valid where the Customer Order has been linked to an existing Work Order.

1. From the ***Sales Orders for Customer [****customer code****]*** screen,
2. Select the ***row*** of the Sales Order you wish to add items to.
3. Click on ***Add Items to WO***.

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

4. When you receive the ***Add Items to WO*** message to confirm;
   - ***Are you sure you wish to add these order items to associated work order no [****WO number****]?***
5. Click on ***Yes***.



6. You will return to the ***Sales Orders for Customer*** listing screen.
7. The Work Order items will have been added to the Sales Order.
8. The OrderStatusDesc field for the Order, will have changed from New Order to ***Invoiced order***.

For a detailed handling of this topic refer to Orders - Add Items to Work Order

NEW DEAL PROJECT

- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.

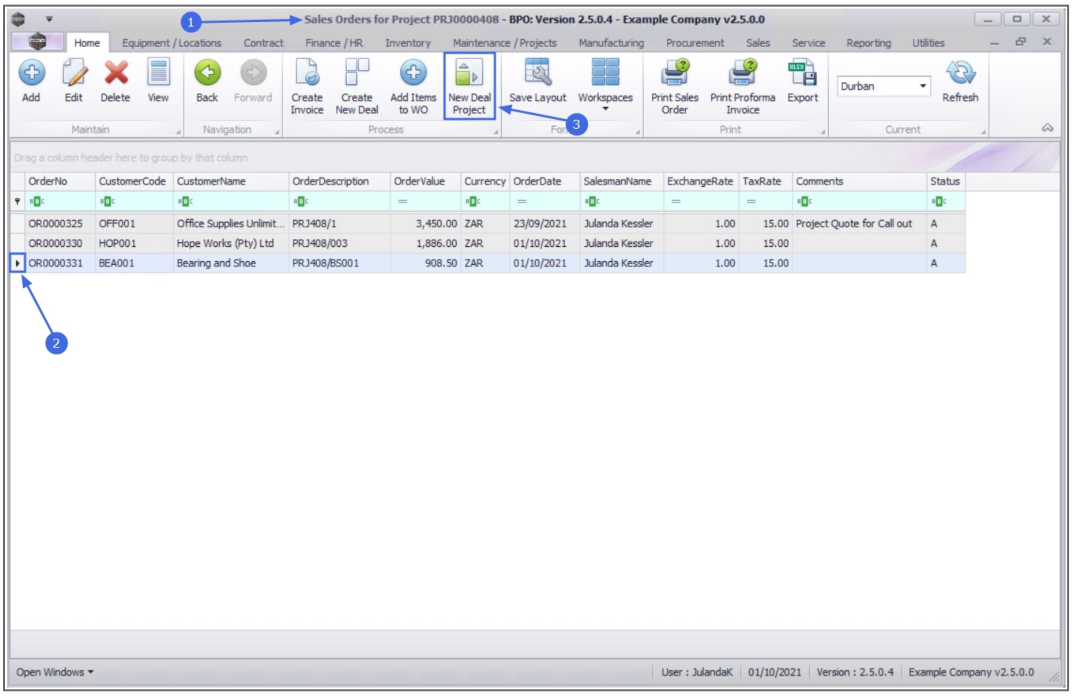
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.

- This process begins from the Sales Orders for Customer Listing screen.

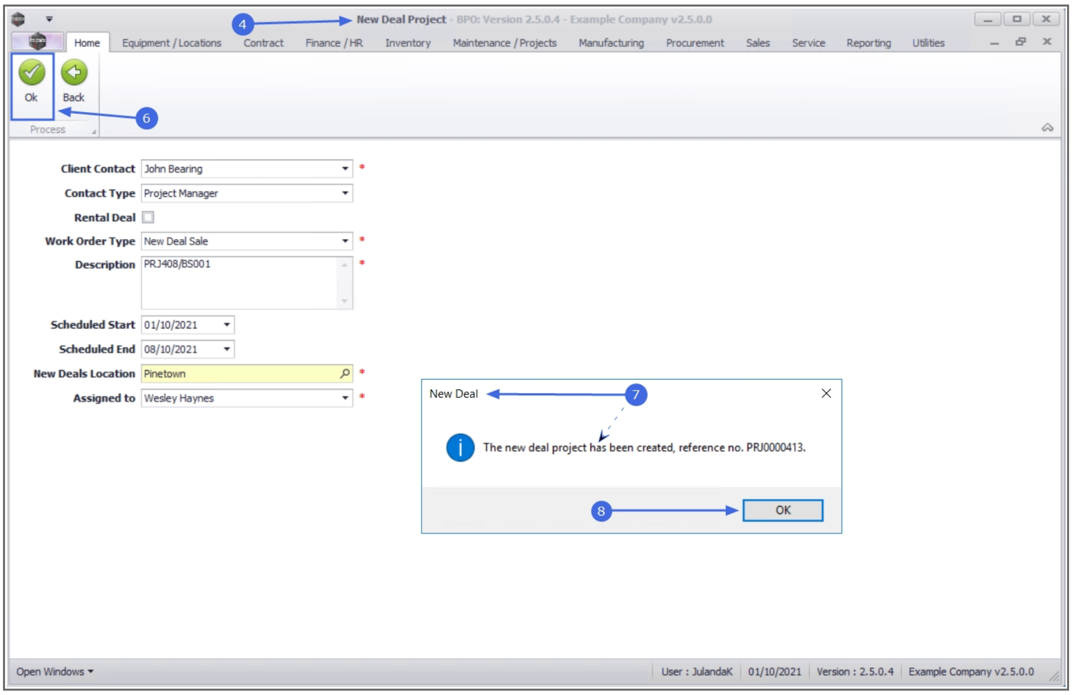
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

1. From the ***Sales Orders for Customer [****customer code****]*** screen,
2. Click on the ***row*** of the ***Sales Order*** you wish to convert to a New Deal Project.
3. Click on ***New Deal Project***.

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



4. "The New Deal Project screen will be displayed. " on page 3
5. Complete the New Deal Project Details as required,
6. Click on ***OK*** to save the new deal details.
7. When you receive the ***New Deal*** message to confirm that;
   - ***The new deal project has been created, reference no. PRJ [****project ref number****]***
8. Click on ***OK***.



PRINT SALES ORDER / PRINT PROFORMA INVOICE

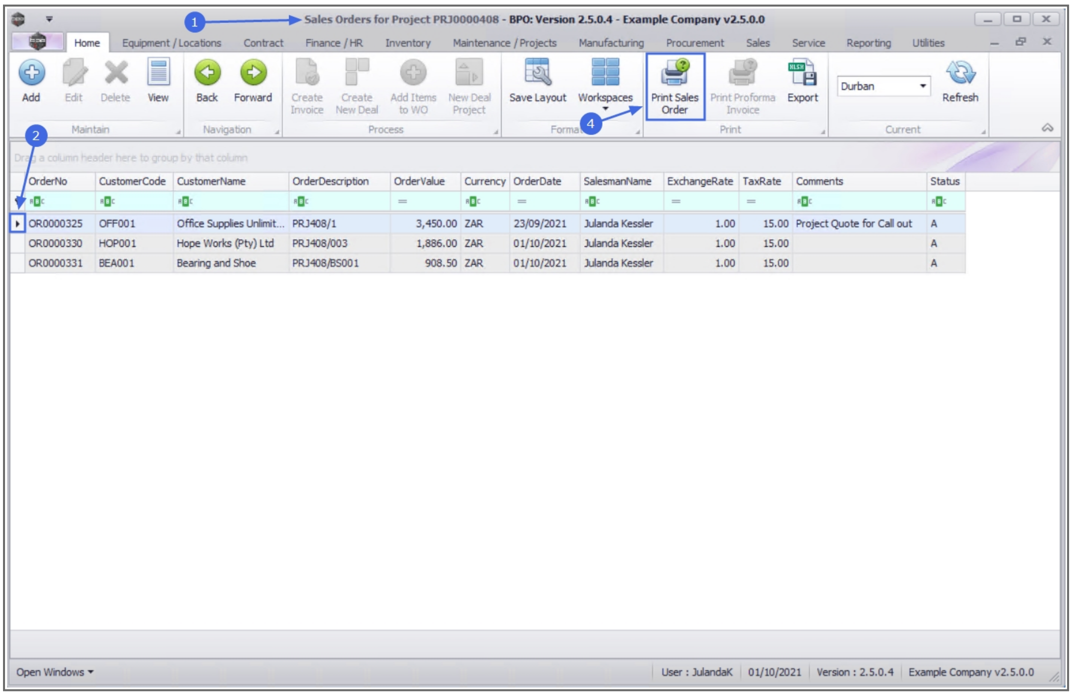
You will be able to ***Print a Sales Order*** and / or ***Print a Proforma Invoice*** from the;

- Sales Orders for Project screen
- Add Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

For this example, the Sales Order will be printed from the ***Sales Orders for Project - PRJ[****project ref number****]*** screen. The same procedure can be followed from any of the above mentioned screens.

1. From the ***Sales Orders for Project - PRJ[****project ref number****]*** screen,
2. Select the ***row*** of the Sales Order you wish to print.

3. Click on the print option you require.
    - Print Sales Order
    - Print Proforma Invoice
4. The example has ***Print Sales Order*** selected.



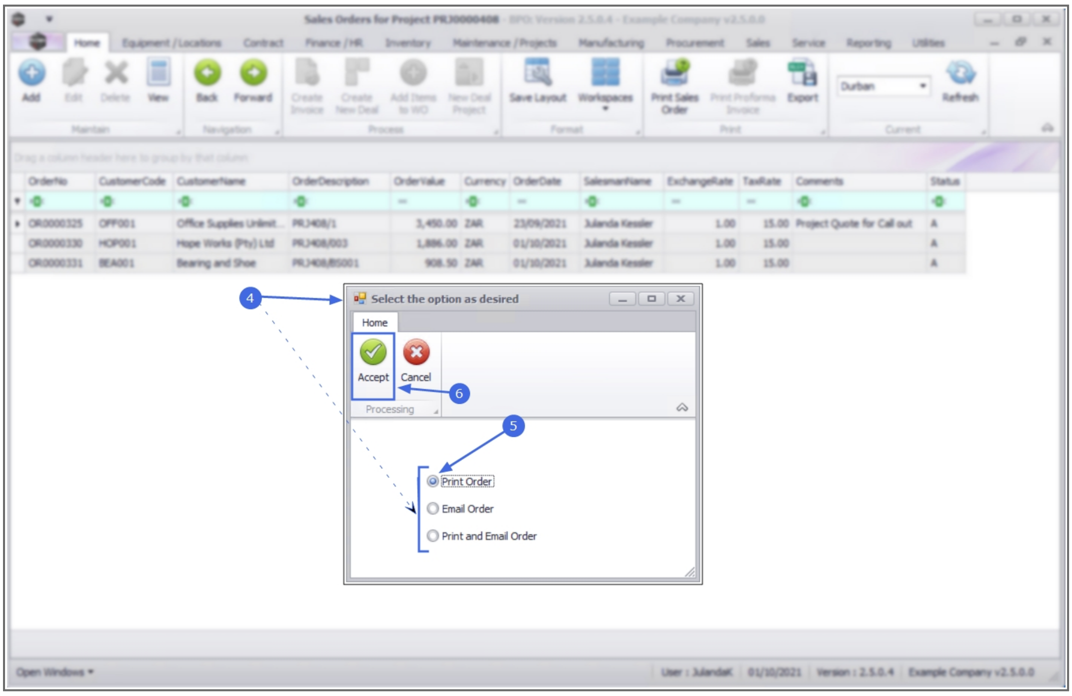
4. The ***Select the option as desired*** message will display with the following options;
    - ***Print Order*** will open the Sales Order in the Preview screen to view, print, export or email.
    - ***Email Order*** will allow you to add recipients and the system will create a .pdf of the Sales Order as an Attachment to the email.
    - ***Print and Email Order*** will display both the Report Preview and Email screens.

5. Click on the ***radio button*** to select the option you require.

> When selecting to *Email the Quote*, the quote will be emailed via the *BPO Email Service* on the server and not from MS Outlook.

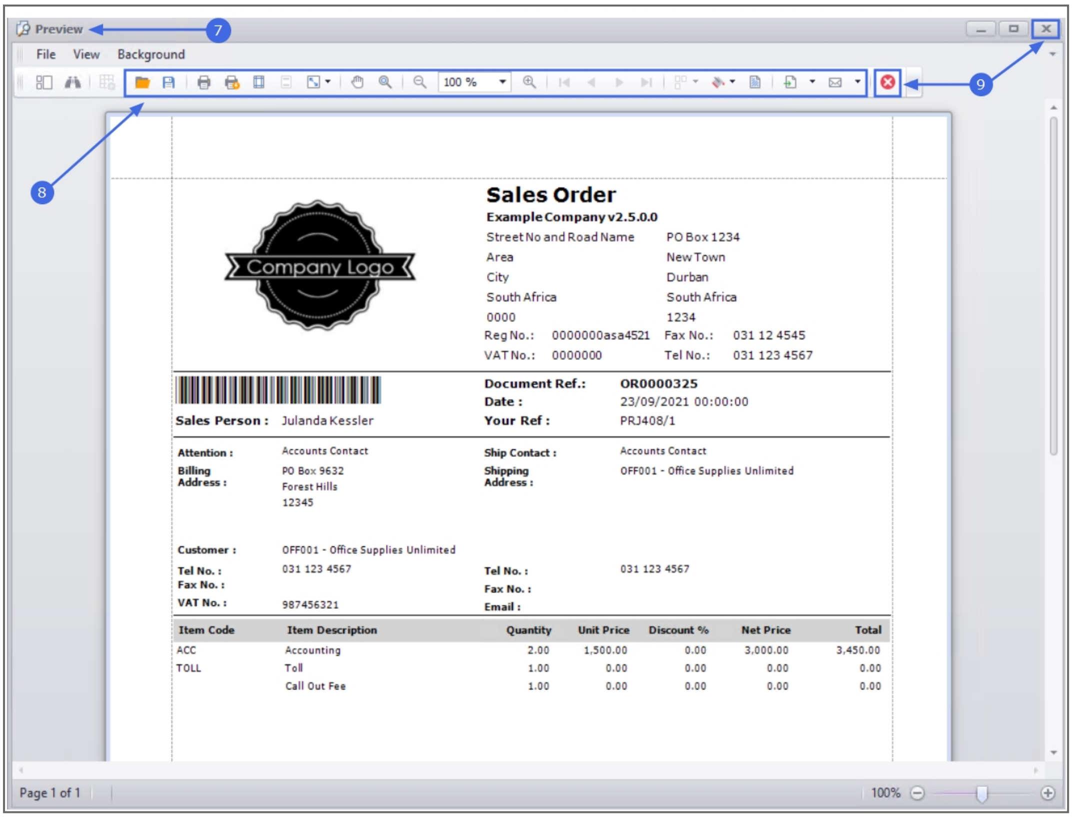
- The example has ***Print Order*** selected.

6. Click on ***Accept***.



7. The Sales Order or the Proforma Invoice, this will depend on the print option you made earlier, will display in the ***Preview*** screen.
8. From this screen you can make cosmetic changes to the document, as well as ***Save***, ***Print***, ***Export***, ***Add a Watermark*** or ***Email*** the Sales Order or Proforma Invoice.
9. Click on ***Close*** to return to the ***Sales Quotes for Customer*** screen.

For a detailed handling of this topic refer to Orders - Print Sales Order or Orders - Print Proforma Invoice


Preview
7
File
View
Background
100 %
9
8
Sales Order
Example Company v2.5.0.0
Street No and Road Name
PO Box 1234
Area
New Town
City
Durban
South Africa
South Africa
0000
1234
Reg No.: 0000000asa4521
Fax No.: 031 12 4545
VAT No.: 0000000
Tel No.: 031 123 4567
Company Logo
Document Ref.: OR0000325
Date : 23/09/2021 00:00:00
Sales Person : Julanda Kessler
Your Ref : PRJ408/1
Attention : Accounts Contact
Billing Address : PO Box 9632
Forest Hills
12345
Ship Contact : Accounts Contact
Shipping Address : OFF001 - Office Supplies Unlimited
Customer : OFF001 - Office Supplies Unlimited
Tel No. : 031 123 4567
Fax No. :
VAT No. : 987456321
Tel No. : 031 123 4567
Fax No. :
Email :
Item Code
Item Description
Quantity
Unit Price
Discount %
Net Price
Total
ACC
Accounting
2.00
1,500.00
0.00
3,000.00
3,450.00
TOLL
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