

Sales Order Confirm

Sales order confirm (Warehouse Dispatch)

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Sales Order functions

Multiple functions for Sales Order Confirm

Picking started

When picking is started on a sales order, the Add, Edit and Delete buttons are disabled.

One can only add or edit items when not picking

The screenshot displays the 'Sales Order Quantity Confirmation' window. The 'Basic' tab is active, showing fields for Sales Order No. (SO-310511), Debtors Code (104318), Debtors Name (Banks Auto Electrical (2010) Ltd), Sales Order Date (2024-04-09), and Invoice Date (2024-04-09). The 'Shipping' tab is also visible. The 'Start' button is highlighted with a green box, and the 'Stop' button is highlighted with a red box. The 'Process' button is also visible. The 'Total Qty Order' is 235, 'Total Picked' is 0, and 'Total O/S' is 235. The '% Complete' is 0%. The 'Add', 'Edit', and 'Delete' buttons are disabled, as indicated by a red box and an arrow pointing to them. A text box below the buttons states: 'Buttons disabled when picking is started. Buttons will become active when picking is stopped'.

#	Sequenc	LS	Item	Description	Order Qty	Available	Total GST	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved
No data to display											

Sales Order code disabled

Sales order editing a line will disable changing the item if

1. The line item has confirmed the quantity
2. The line item has invoiced quantity

Edit Confirmed Sales Order Item
QTY: 49

Confirmation Line

Inventory Overview
View Image
Task Link
Functions
Currency: \$ - NZ Dollar
Points:
Category: Stock

Details
Notes
UOM

Stock Item:
SSKS4CS06*025 - M6 x 25 Socket Coutersunk Socket Screw Stainless Steel

Description:
M6 x 25 Socket Coutersunk Socket Screw Stainless Steel 304 #4308T

Group:

Order Qty:
8
Reserved Qty:
0

Confirmation Type:
Confirmation
Warehouse:
MAST - Master Warehouse

Pricing Structure:
DEFAULT
UOMType:
100 - 100 Pack

Selling Ex GST:
1.87
UOM:
HND - HND

Selling Inc GST:
2.15
Line Discount:
Promotion:

Sub Total Selling:
3.74
GST Type:
01 Invoice GST:15

GST Value:
0.56
Mark-up %:

Total Selling:
4.30
Cost Per Unit:

Line Reference:
Profit Cost / Unit:

Sequence No:
1.0000
Total Cost:

Show In Print:
Flag:
Weight Per Unit:
0.0000

BOM Selection:
Total Weight:
0.0000

Division:
Sales Rep:

Region:
Project:

Lead Time:
0
Order Date:
2024-04-09

Reminder Date:
2024-04-09
Reminder

Required Date:
2024-04-09

Creditors:

Drop Ship:
RFQ:

PO Qty:
0

Qty On Sales Orders:
Detail

Qty On SO Confirm / WHS:
0
Detail

Save And New
Save And Close
Close

Update Cost
Recalculate

Changing of item disabled if item has confirmed values or line has been invoiced

Lines items disabled on confirmed and invoiced quantities

Sales Order Quantity Confirmation

Attachments

Confirm Qty

Confirm All

Un-Confirm All

Confirm Scan

Print Picking Slip

ScanSKU

Print

Save

Close

Basic

Address

Shipping

Scan

Sales Order No.: SO-310531

Debtors Code: 100287

Debtors Name:

Sales Order Date: 2024-04-09

Description:

Reference:

Order No.: FLOATING

Invoice Date: 2024-04-09

Start

Stop

Process

Locked:

Total Qty Order

754

Total Picked

754

0

Total O/S

0

% Complete

100 %

Page 1 of 1

Add

Edit

Delete

Show All Lines:

Close Line

Displaying 1 - 15 of 15

#	Sequenc	LS	Item	Description	Order Qty	Available	Total GST	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved
1	1		B10HT20*180Z	M20 x 180 Zinc High Tensile Bolts Only *...	3.0000	3		3.0000			
2	2		BHT08*080Z	M8 x 80 Zinc High Tensile Bolts/Nuts #ST...	20.0000	991		20.0000			
3	3		BHT16*080Z	M16 x 80 Zinc High Tensile Bolts/Nuts #S...	20.0000	1917		20.0000			
4	4		BHT16*140Z	M16 x 140 Zinc High Tensile Bolts/Nuts #...	12.0000	234		12.0000			
5	5		NN06Z	M6 x 1.0P Nyloc Nuts Zinc *Class 8* #ST...	100.0000	163612		100.0000			
6	6		NN10Z	M10 x 1.5P Nyloc Nuts Zinc *Class 8* #S...	100.0000	67937		100.0000			
7	7		NN16Z	M16 x 2.0P Nyloc Nuts Zinc *Class 8* #S...	100.0000	40118		100.0000			
8	8		WSQ12*50*3G	M12 x 50 x 50 x 3 Square Washers Galv ...	50.0000	508		50.0000			
9	9		WSQ16*50*3G	M16 x 50 x 50 x 3 Square Washers Galv ...	50.0000	30952		50.0000			
10	10		WH12*32G	M12 x 32 Heavy Washer Galv #STOCK	100.0000	1852		100.0000			
11	11		BC08*090G	M8 x 90 Galv Coach Bolt/Nuts #ROLD5	60.0000	9484		60.0000			

Unlocking a Sales Order in Started picking state

When a sales order is has a blue lock, it means that it is in the process of been picked and is locked by the user picking.

To unlock the sales order, unlock

Sales Order Confirm

Search Edit Clone Reminder View SO Stock Request Close / Cancel

Actions Process Print/Export

Basic Search Custom Search Expand

Sales Order No: Debtor Status: Status: Reference: Date From: 2024-01-11 Date To:

Overdue Items 0 Today Items 85 Next 7 Days 0

Orders Waiting

Page 1 of 2 Remove Paging:

#	Att	Memo	Status	Progress	Sales Order No	On Hold	Sales Order Date	Status	Debtors Code	Debtors Name
1					SO-310509		2024-04-09	Confirmed	106767	
2					SO-310511		2024-04-09	Confirmed	104318	
3									07478	
4									01604	
5									05066	
6									0700	
7									03611	
8									01181	
9									05648	
10										
11										
12										
13										
14					SO-310537		2024-04-09	Confirmed	100308	

Un-Lock Sales Order

User Name: Password:

Continue Close

Enter your user login and password to unlock

Debtor Info

Attachments Memo Create Reminder Functions Send Email Confirm Order History Import

Sales Order

Detail Address Extras Link Shipping Docs Custom Fields Save Close Print SO Authorize SO Confirm Quantit Process SO T & Cs View Quote Revert SO

Sales Order No.: **SO10789** Sales Order Status: **Partially Completed**

Customer: 1008 Description:

Customer Name: ACE Traders Reference:

Sales Rep.: Company Order Number:

Sales Order Date: 2024-07-03 Currency View: Document Currency

Due Date: 2024-08-20 20 Day Of Month 1 Exchange Rate: 1 R - Rand South Africa

Debtor Status: Shipping Complete Comment:

Items

Debtor Info

Debtor Code:

1008

Over Due:

42,201.10

Out Standing:

27,276.64

Name:

ACE Traders

Trading As:

Price Level:

Ace Traders

Line Discount:

Line Markup:

Discount Matrix:

MX DISC Matrub

Discount:

5

Override Lock Pricing:

Enforce Credit Limit:

☐ Limit: 0.00

On Hold:

☐

On Hold Reason:

Commission:

Company

Website:

Telephone 1:

Telephone 2:

Fax:

Contact Name:

Imraan Salijee

Mobile No:

Email:

service@barcodeproducts.co.nz

Email

Close

Actions

Sales Order Confirm

Search

Edit

Clone

Reminder

View SO

Stock Request

Close / Cancel

Actions

Process

Print/Export

Basic Search

Custom Search

Expand

Sales Order No:

Customer:

Description:

Date From:

Debtor Status:

Status:

Reference:

Date To:

Confirm

Confirm Qty

Partial Complete

Unlock Picking Order

Revert SO

Unlock Picking Order

Un-Lock Sales Order

User Name:

Password:

Continue

Close

Print Picking Slip

×

Print Options?

☒ Standard

☐ SO Sequence

☐ Bin location

☐ Product Code

☐ Brand

Show Build Kit:

☐

Print Notes:

☐

Email ScanSKU File:

☐

➤➤➤ Continue

✖

Cancel

Sales Order Confirm Qty

Confirming your quantity on the sales order can be done in multiple ways.

- 1. Receive quantity single check items
- 2. Receive all quantity
- 3. Barcode scan products to check the correct stock picked and quantity
- 4. Import ScanSKU barcode scan order

Once a sales order is under confirmed status

Go to Debtors **Module> Activity> Sales Order Confirm**

To confirm quantity click start

Attachments

Confirm Qty

Confirm All

Un-Confirm All

Confirm Scan

Print Picking Slip

ScanSKU

Print

Save

Close

Basic

Address

Shipping

Scan

Sales Order Log

Sales Order No.: SO10798

Debtor Code: OTS001

Debtor Name: Otsile

Sales Order Date: 2024-07-11

Description: Test 1

Reference: Test 1

Order No.: 125

Invoice Date: 2024-07-11

Start

Stop

Process

Locked:

Picking Started by Otsile Loate at 2024-08-21 02:42:50

Total Qty Order17

Total Picked0

229.9

Total O/S17

% Complete0%

Page 1 of 1

Paging

Add

Edit

Delete

Close Line

Show Lines

Item Info

Displaying 1 - 2 of 2

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		111100060	Below Zero Water	2.00	85			2.00		19.00	
2	2		101142	Below Zero Man...	15.00	1815			15.00		26.00	

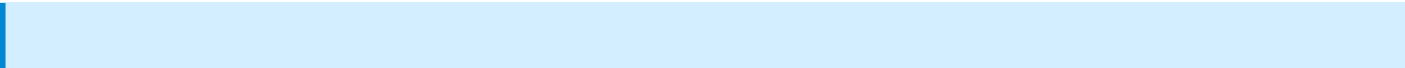
Confirm Qty

Confirm qty allows you to confirm each stock item based on how much stock needs to be invoiced out or is available to be picked

Click confirm qty

The screen below will pop up

Then confirm all quantities, click next if you do not wish to confirm qty



If you add a number you wish to confirm and click next, the confirmed qty won't save

Click qty add the quantity you want to confirm then save and new to confirm a new stock item

Sales Order Quantity Confirmation

Attachments **Confirm Qty** Confirm All Un-Confirm All Confirm Scan Print Picking Slip ScanSKU Print Save Close

Basic Address Shipping Scan Sales Order Log

Sales Order No.: **S010798** Description: Test 1 **Start**
Debtor Code: OTS001 Reference: Test 1 **Stop**
Debtor Name: Otsile
Sales Order Date: 2024-07-11
Locked: Picking Start

Total Qty Order **17**

Page 1 of 1

#	Sequence No	LS	It
1	1		1
2	2		1

Confirm Quantity

Serial Numbers Inventory Overview

Stock Item: **111100060 - Below Zero Water**

Ordered Qty:	2.00	On Hand Qty:	85.00
Balance Qty:	2.00	In Invoice Qty:	19.00
Reserved Qty:	0.00	Available Qty:	85.00
Confirmed Qty:	0.00	Confirm Qty:	1
Invoiced Qty:	0.00		

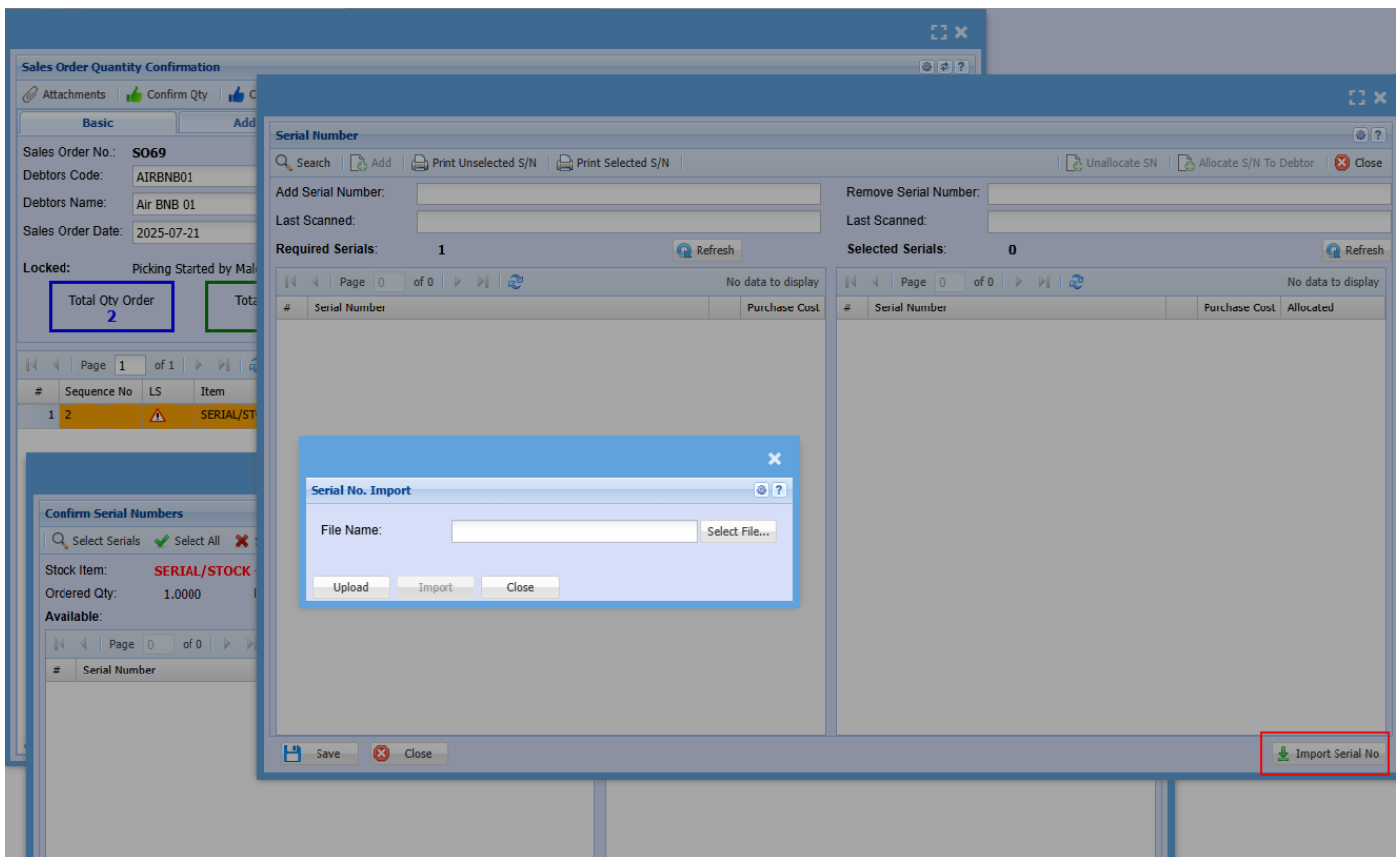
[Clear Confirmed Qty](#)

Save And Next Save And Close Next Close

Serial number confirm and import

File is a .csv file layout

First column is SerialNumber



Confirm All

This is a quick button to confirm that all quantities on the sales order are fully received.

Click [here](#) for a step-by-step manual on un-confirm All

Sales Order Quantity Confirmation

AttachmentsConfirm QtyConfirm AllUn-Confirm AllConfirm ScanPrint Picking SlipScanSKUPrintSaveClose

BasicAddressShippingScanSales Order Log

Sales Order No.:SO10798

Debtor Code:OTS001

Debtor Name:Otsile

Sales Order Date:2024-07-11

Description:Test 1

Reference:Test 1

Order No.:125

Invoice Date:2024-07-11

Start

Stop

Process

Locked:

Picking Started by Otsile Loate at 2024-08-21 02:42:50

Total Qty Order17

Total Picked17

Total Weight27.2

Total O/S0

% Complete100 %

Page 1 of 1

PagingAddEditDeleteClose LineShow LinesItem Info

Displaying 1 - 2 of 2

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		111100060	Below Zero Water	2.00	85	2.00				19.00	
2	2		101142	Below Zero Man...	15.00	1815	15.00				26.00	

Un-Confirm All

Un-Confirm All allows you to clear all confirmed quantities on a sales order

Sales Order Quantity Confirmation

AttachmentsConfirm QtyConfirm AllUn-Confirm AllConfirm ScanPrint Picking SlipScanSKUPrintSaveClose

BasicAddressShippingScanSales Order Log

Sales Order No.:SO10798

Debtor Code:OTS001

Debtor Name:Otsile

Sales Order Date:2024-07-11

Description:Test 1

Reference:Test 1

Order No.:125

Invoice Date:2024-07-11

Start

Stop

Process

Locked:

Picking Started by Otsile Loate at 2024-08-21 02:42:50

Total Qty Order17

Total Picked17

Total Weight27.2

Total O/S0

% Complete100 %

Page 1 of 1

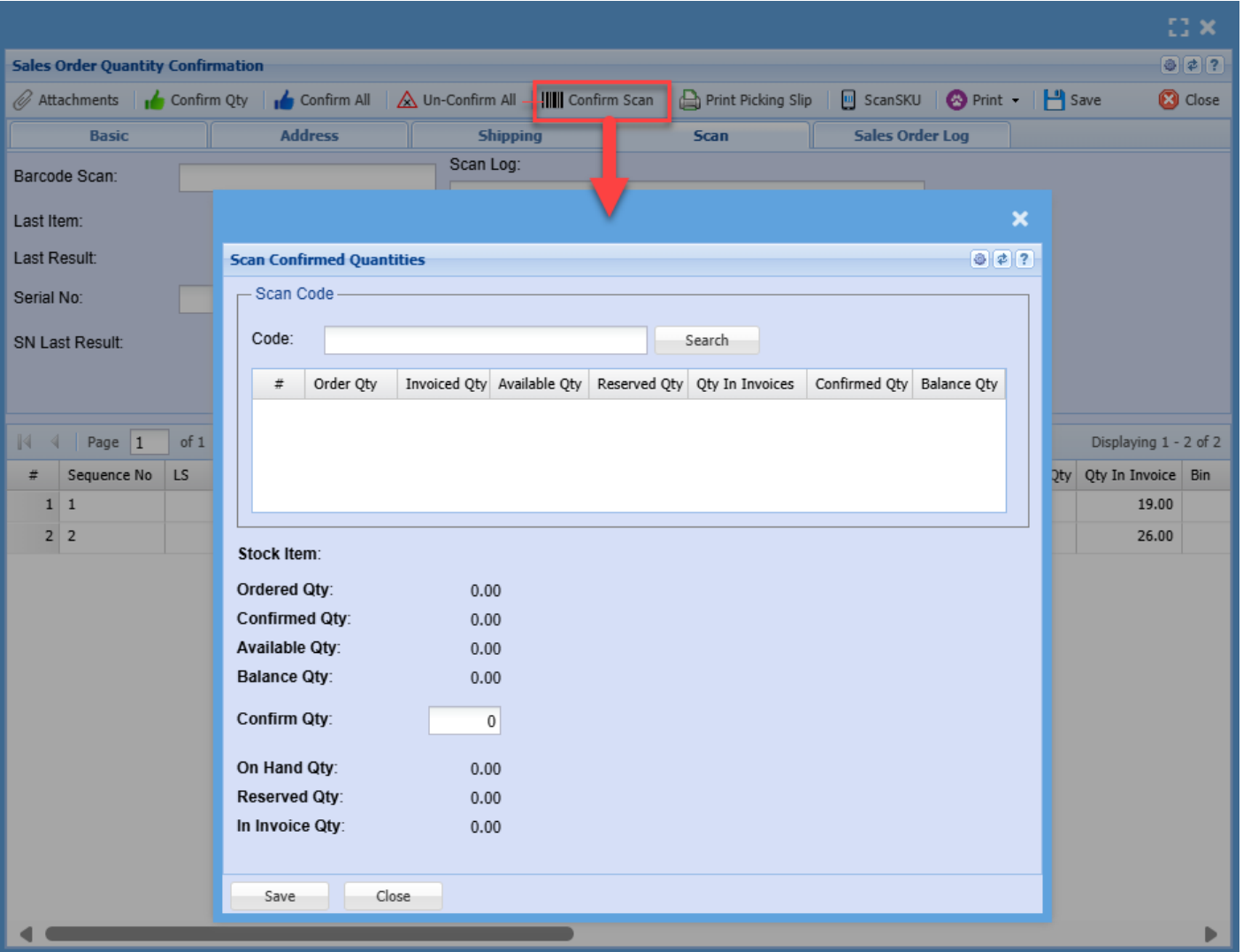
PagingAddEditDeleteClose LineShow LinesItem Info

Displaying 1 - 2 of 2

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		111100060	Below Zero Water	2.00	85	2.00				19.00	
2	2		101142	Below Zero Man...	15.00	1815	15.00				26.00	

Barcode Confirm Scan

Using a barcode scanner, scan each item to confirm that it is the correct item with the correct picked stock item



Sales Order Unconfirm Quantity

Go to Debtors Module> Activity> Sales Orders

Search the required Sales order

You need to change the search screen status to find Sales orders that have already been confirmed and migrated from preparation status

Sales Order Confirm

Search

Edit

Clone

Reminder

View SO

Stock Request

Close / Cancel

Actions

Process

Print/Export

Basic Search

Custom Search

Expand

Sales Order No:

Debtor Status:

Customer:

L:

Status:

Confirmed And Partially Completed

Description:

Reference:

Date From:

2024-07-22

Date To:

2024-08-21

Overdue Items

0

Today Items

181

Next 7 Days

0

Once you have found the required sales order, Double-click the line

The sales order will open and you can verify the details of the order

Sales Order Quantity Confirmation

Confirm Qty

Confirm All

Un-Confirm All

Confirm Scan

Print Picking Slip

ScanSKU

Print

Close

Basic

Scan

Sales Order No.:

SO10451

Sales Order Date:

2023-07-07

Start

Debtor Code:

1002

Debtor Name:

TRACEY LEE MOODLEY

Stop

Reference:

Woodmead

Order No.:

Sales Rep.:

Erica Molefe

Description:

Stock

Locked:

Picking Started by Imraan Salijee at 2023-07-07 09:41:52

Total Qty Order

10

Total Picked

0

Total Weight

0

Total O/S

10

% Complete

0 %

Page 1 of 1

Show All Lines:

Displaying 1 - 1 of 1

#	Sequence No	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty
1	1	101145	Below Zero Pine...	10.00	10	10.00				

Note: Once item quantities have been confirmed, the line will be hidden from the grid. This is so the user can easily see which items are still outstanding in cases where you have large orders with many item lines.

To unhide these confirmed lines, click on Show All Lines button

This displays all the sales order item lines

Sales Order Quantity Confirmation

Attachments Confirm Qty Confirm All Un-Confirm All Confirm Scan Print Picking Slip ScanSKU Print Save Close

Basic Address Shipping Scan Sales Order Log

Sales Order No.: **SO10798** Description: Test 1 **Start**
Debtor Code: OTS001 Reference: Test 1 **Stop**
Debtor Name: Otsile Order No.: 125 **Process**
Sales Order Date: 2024-07-11 Invoice Date: 2024-07-11

Locked:

Total Qty Order **17** Total Picked **17** 229.9 Total O/S **0** % Complete **100 %**

Page 1 of 1 Paging Add Edit Delete Close Line **Show Lines** Item Info Displaying 1 - 2 of 2

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		111100060	Below Zero Water	2.00	83	2.00				19.00	
2	2		101142	Below Zero Man...	15.00	1800	15.00				26.00	

You can then search for the item you wish to un-confirm quantities on

Double-click the line

Click the Clear Confirmed Qty Button

QTY: 83

Confirm Quantity

Serial Numbers Inventory Overview

Stock Item: **101142 - Below Zero Mango 12x150ml MG**

Ordered Qty: 15.00 On Hand Qty: 1800.00
Balance Qty: 0.00 In Invoice Qty: 26.00
Reserved Qty: 0.00 Available Qty: 1800.00
Confirmed Qty: 15.00 Confirm Qty: 0
Invoiced Qty: 0.00

Clear Confirmed Qty

Save And Next Save And Close Next Close

If you have multiple item lines on the sales order that have confirmed quantities and you wish to un-confirm all the lines, then click the Un-Confirm All Button

Sales Order Quantity Confirmation

AttachmentsConfirm QtyConfirm AllUn-Confirm AllConfirm ScanPrint Picking SlipScanSKUPrintSaveClose

BasicAddressShippingScanSales Order Log

Sales Order No.: SO10798

Debtor Code: OTS001

Debtor Name: Otsile

Sales Order Date: 2024-07-11

Locked: Picking Started by Otsile Loate at 2024-08-21 03:11:53

Description: Test 1

Reference: Test 1

Order No.: 125

Invoice Date: 2024-07-11

Start

Stop

Process

Total Qty Order17

Total Picked17

Total Weight27.2

Total O/S0

% Complete100 %

Page 1 of 1

PagingAddEditDeleteClose LineShow LinesItem Info

Displaying 1 - 2 of 2

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		111100060	Below Zero Water	2.00	83	2.00				19.00	
2	2		101142	Below Zero Man...	15.00	1800	15.00				26.00	

You can then reconfirm the items with amended quantities, or

You can Unauthorise the sales order and this will allow you to edit the line items and add addition items if need be.

Sales Order Picking Slip logs

When confirming a Sales Order and printing a picking slip.

Logs will be created to on picking slip screen and print picking slip.

Sales Order confirm screen will show a small Print icon to indicate that a picking slip was printed.

Sales Order Confirm

Search

Edit

Clone

Reminder

View SO

Stock Request

Close / Cancel

Actions

Process

Print/Export

Basic Search

Custom Search

Expand

Sales Order No:

Debtor Status:

Customer:

L:

Status:

Confirmed And Partially Completed

Description:

Reference:

Date From:

2024-05-15

Date To:

2024-06-27

Overdue Items

0

Today Items

176

Next 7 Days

0

Orders Waiting

Page 1 of 1

Remove Paging:

#	Att	Memo	Status	Ship	Printed P	%	Progress	Sales Order No	On Hold	Sales Order Date	Internal Contact
1						100%		SO10765		2024-05-15	Imraan Saljee
2								SO10770		2024-05-23	Imraan Saljee
3								SO10771		2024-05-24	Imraan Saljee
4								SO10779		2024-05-30	

Clicking on the icon will open up the sales order log file

Best to sort Log Date Time with latest date at the top

Print

Email

Sales Order Picking Slip

Email To Self

Close

Sales Order No: SO10779
Client: 1018 - MG New sales lead 1
Short Details: test sub item
Long Details:
Total Lines: 2

Date: 2024-05-30
Reference:
Order Number:
Print Date: 2024-06-26 19:19:28

No.	Item Code	Description	Warehouse	Bin	QTY On Hand	Balance QTY	Confirm Qty	Picked
1		please do not send blue colours						
2	20-03/269011PVC Tool Snips Stubai PVC Pelicn R Snips		Master Warehouse		0.0000	1.0000	0.0000	
Total Items:						1.0000		

Picked By: _____
Date: _____
Signature: _____

Sales order print indicated

The sales order confirm screen shows the icon on the window to show that a print picking slip was done.

Attachments

Confirm Qty

Confirm All

Un-Confirm All

Confirm Scan

Print Picking Slip

ScanSKU

Print

Save

Close

Basic

Address

Shipping

Scan

Sales Order Log

Sales Order No.: SO10779
Debtor Code: 1018
Debtor Name: MG New sales lead 1
Sales Order Date: 2024-05-30

Description: test sub item
Reference:
Order No.:
Invoice Date: 2024-05-30

Start

Stop

Process

Locked:

Total Qty Order

1

Total Picked

0

0

Total O/S

1

% Complete

0 %

Page 1 of 1

Add

Edit

Delete

Close Line

Show All Lines:

Displaying 1 - 1 of 1

#	Sequer	LS	Bin	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invc
1	2			20-03/269011PVC Snips	Tool Snips Stub...	1.0000	0			1.0000		

The sales order log tab will indicate the logs on the sales order

Sales Order Quantity Confirmation

AttachmentsConfirm QtyConfirm AllUn-Confirm AllConfirm ScanPrint Picking SlipScanSKUPrintSaveClose

BasicAddressShippingScanSales Order Log

Page 1 of 1

Displaying 1 - 9 of 9

#	Captured By	Log Date Time	Action	Action Detai	Stock Code	Stock Descr
1	Malcolm Granville	2024-06-26 19:19:...	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779			
2	Malcolm Granville	2024-06-26 19:07:...	User: Malcolm Granville Printed Picking Slip for Document: SO10779			
3	Malcolm Granville	2024-06-26 19:07:...	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779			
4	Gerrit van Rooyen	2024-06-26 10:20:...	User: Gerrit van Rooyen Printed Picking Slip for Document: SO10779			
5	Gerrit van Rooyen	2024-06-26 10:20:...	User: Gerrit van Rooyen Continued printing of Picking Slip for Document: SO10779			
6	Gerrit van Rooyen	2024-06-25 10:35:...	User: Gerrit van Rooyen Continued printing of Picking Slip for Document: SO10779			
7	Gerrit van Rooyen	2024-06-25 10:23:...	User: Gerrit van Rooyen Cancelled printing of Picking Slip for Document: SO10779			

Page 1 of 1AddEditDeleteClose LineShow All Lines

Displaying 1 - 1 of 1

#	Sequer	LS	Bin	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invc
1	2			20-03/269011PVC Snips	Tool Snips Stub...	1.0000	0			1.0000		

User Access log

Logs are recorded in the user access log

User Access Report

SearchEmailPrint/Export

User Log In ID:Form Name:From Date:2024-06-26To Date:2024-06-27Document Number:Display Name:Debtor / Creditor:CreditorDebtorDebtor / Creditor:

Page 1 of 4Remove Paging:

#	Date And Time	Access User	Display Name	Form Name	Document ID	Document No	Debtor Code
1	2024-06-26 19:24:41	Malcolm	User Access Report Screen	frmSCMUserAccessReport			
2	2024-06-26 19:24:34	Malcolm	frmFramesPage	frmFramesPage			
3	2024-06-26 19:21:51	Malcolm	frmSalesOrderConfirmation	frmSalesOrderConfirmation			
4	2024-06-26 19:19:28	Malcolm	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779	830	SO10779	1018
5	2024-06-26 19:19:28	Malcolm	frmSalesOrderPickingSlipPrint	frmSalesOrderPickingSlipPrint			
6	2024-06-26 19:18:46	Malcolm	frmSalesOrderConfirmationCrit	frmSalesOrderConfirmationCrit			
7	2024-06-26 19:14:45	Malcolm	frmSalesOrderLog	frmSalesOrderLog			
8	2024-06-26 19:07:23	Malcolm	User: Malcolm Granville Printed Picking Slip for Document: SO10779	User: Malcolm Granville Printed Picking Slip for Document: SO10779	830	SO10779	1018
9	2024-06-26 19:07:16	Malcolm	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779	User: Malcolm Granville Continued printing of Picking Slip for Document: SO10779	830	SO10779	1018
10	2024-06-26 19:07:16	Malcolm	frmSalesOrderPickingSlipPrint	frmSalesOrderPickingSlipPrint			
11	2024-06-26 19:07:09	Malcolm	frmSalesOrderConfirmationCrit	frmSalesOrderConfirmationCrit			
12	2024-06-26 19:07:00	Malcolm	frmSalesOrderConfirmation	frmSalesOrderConfirmation			
13	2024-06-26 19:06:41	Malcolm	frmSalesOrderLog	frmSalesOrderLog			

ScanSKU Confirm

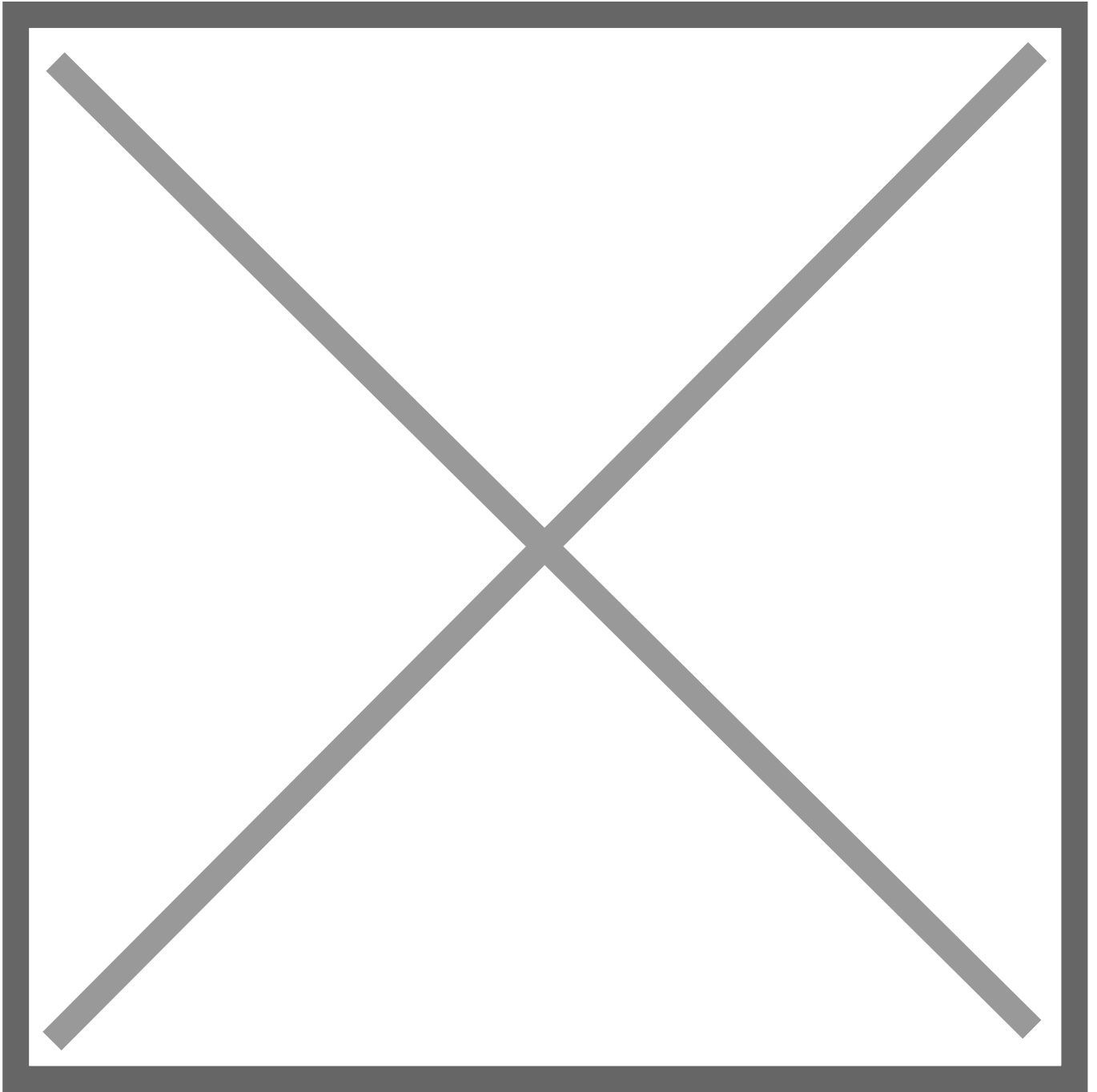
Using a ScanSKU scanner

Watch video manual on how to [scan from ScanSKU device](#)

Picking via a ScanSKU device

Email the file for picking

When promoting the Sales order as confirmed, an option will appear to email the sales order file to the ScanSKU device



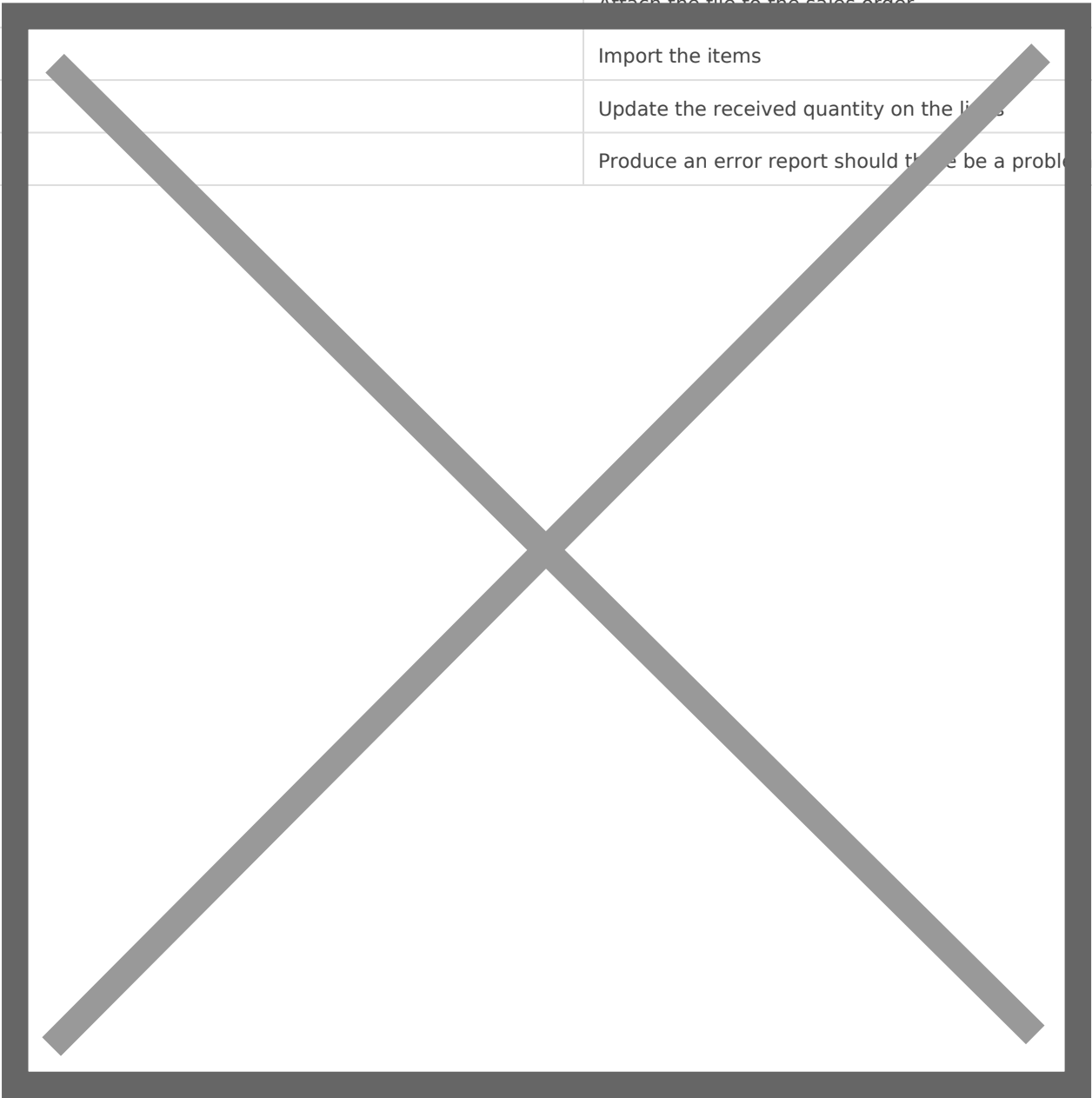
Import ScanSKU file

Once the scan has been completed, click on the ScanSKU to import scanned picked quantities.

Drag directly from your email into this section

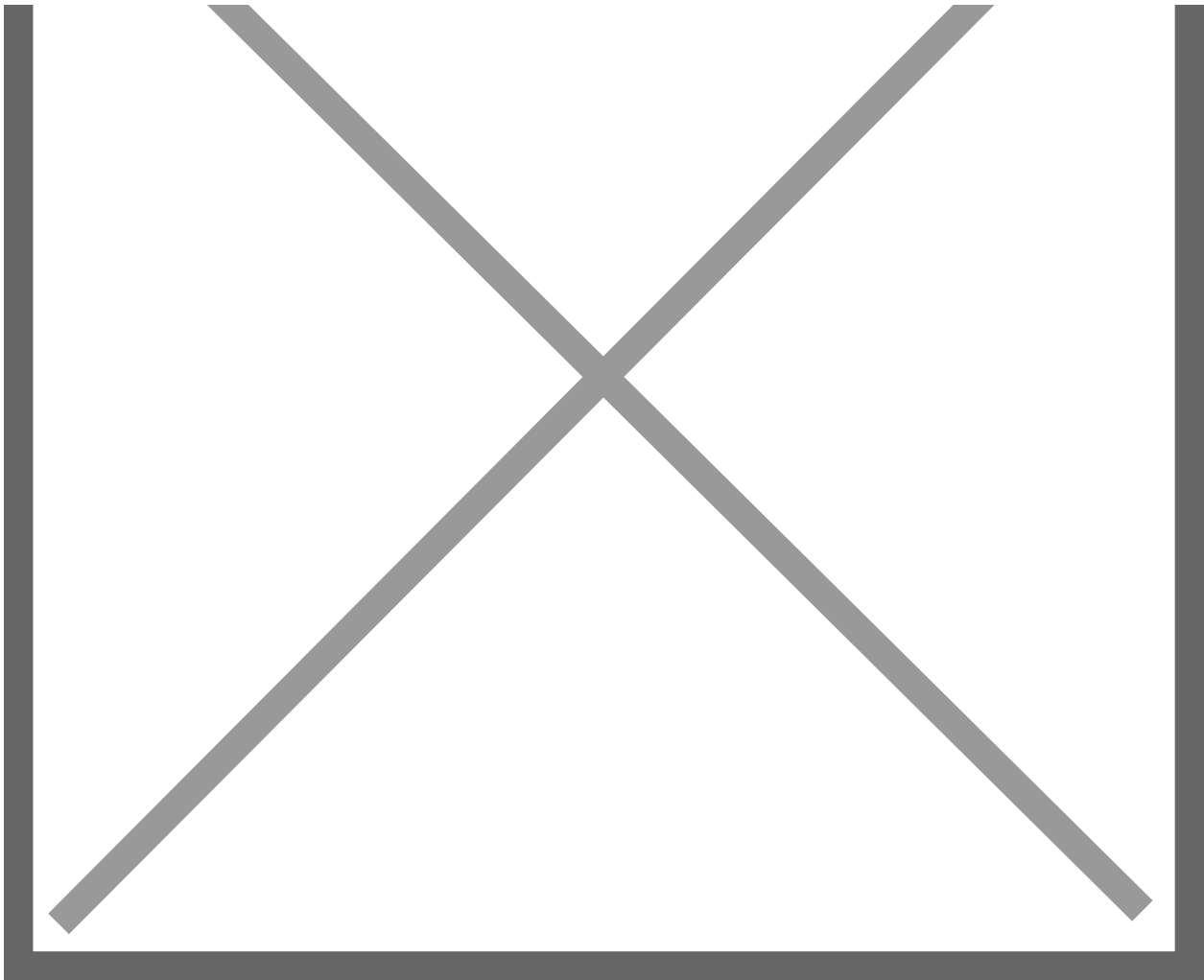
The file will do the following:

1	Upload the file
2	Attach the file to the sales order
3	Import the items
4	Update the received quantity on the lines
5	Produce an error report should there be a problem



Email ScanSKU file if not emailed

Email ScanSKU file from Confirm Screen

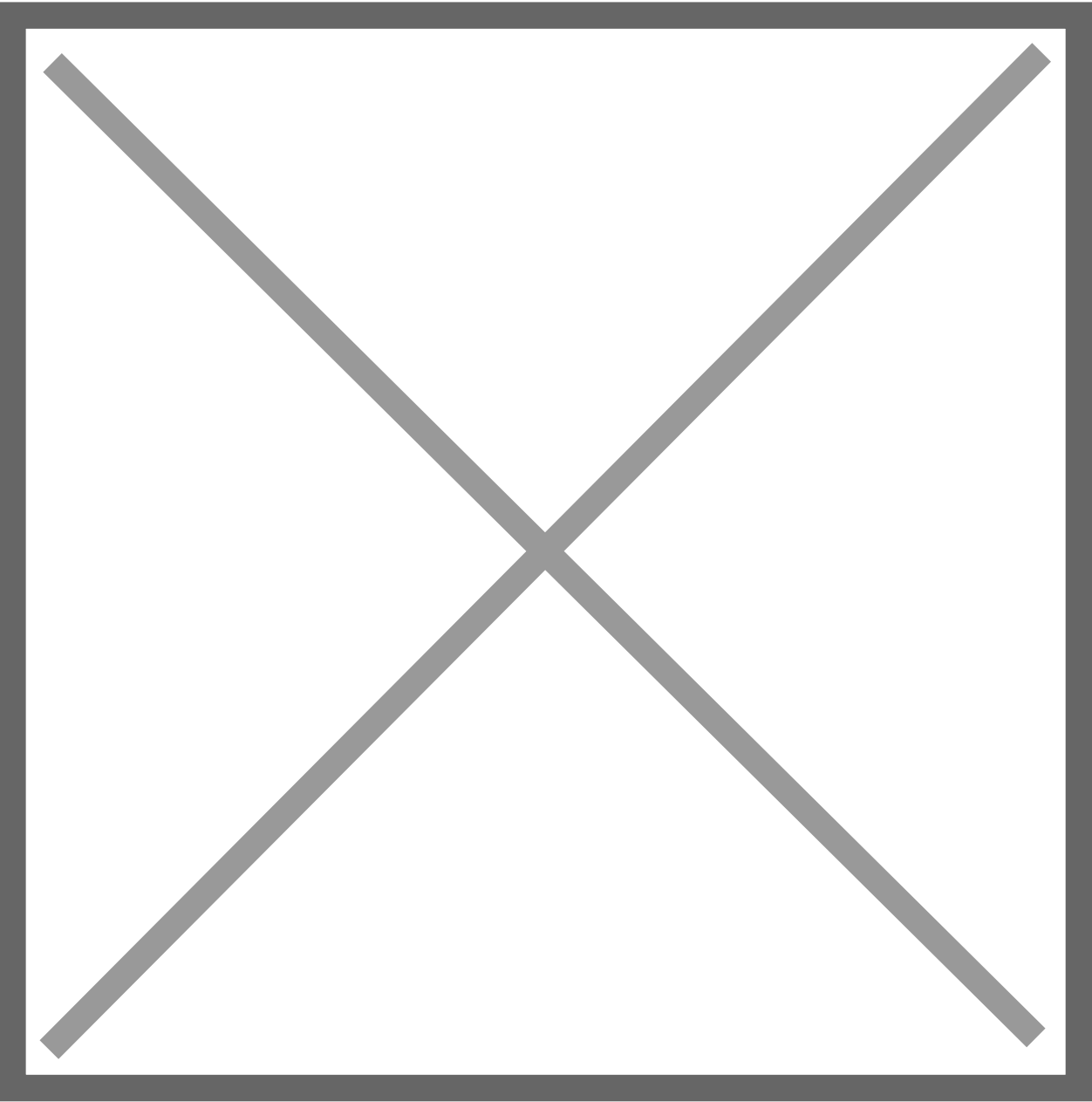


ScanSKU email setup per user

Go to System Configuration> General> User Setup

Each user can have a unique email address to send to for their specific scanner.

Each Barcode scanner should have their own Gmail account for Android.



Sales Order Confirm Search

Confirmation search screen is where confirming of picking of stock is done. Generally in the warehouse.

Debtors Module

Configuration

Activity

Customer Dashboard

Debtors Journal Transactions

Debtor Cash Book

Quotation

Sales Order

Sales Order Confirm

Invoices

Dispatch Stock

Sales Order Confirm

Search

Edit

Clone

Reminder

View SO

Stock Request

Close / Cancel

Actions

Process

Print/Export

Basic Search

Custom Search

Expand

Sales Order No:

Debtor Status:

Customer:

L:

Status:

Confirmed And Partially Completed

Description:

Reference:

Date From:

2024-05-29

Date To:

2024-06-28

Overdue Items

1

Today Items

177

Next 7 Days

1

Orders Waiting

Page 1 of 1

Remove Paging

#	Att	Memo	Status	Ship	Printed P	%	Progress	Sales Order No	On Hold	Sales Order Date	Internal Contact
1								SO10779		2024-05-30	Malcolm Granville
2								SO10782		2024-06-27	

Sales Order Confirmation Functions

Sales order confirmation the following function was recently added

- 1. Close button function
- 2. Item information button
- 3. Sorting on columns - This allows you to sort by column when clicking on the column

Sales Order Quantity Confirmation

AttachmentsConfirm QtyConfirm AllUn-Confirm AllConfirm ScanPrint Picking SlipScanSKUPrintSaveClose

BasicAddressShippingScanSales Order Log

Sales Order No.:SO10813Debtor Code:TSI001Debtor Name:Tsale TestSales Order Date:2024-08-08Description:Test Order NumberReference:Order No.:Invoice Date:2024-08-08

StartStopProcess

Locked:

Total Qty Order23Total Picked00Total O/S23% Complete0%

Page 1 of 1PagingAddEditDeleteClose LineShow LinesItem Info

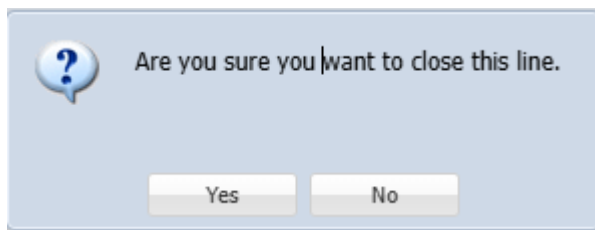
#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	2		101145	Below Zero Pine...	10.00	0			10.00		13.00	
2	3		101142	Below Zero Man...	11.00	0			11.00		26.00	

Close Line Button

Allows you to close a line item from sales order confirmation without having to close the whole order

When clicking on the close line button the screen below will pop up to alert you that you are about to close a line and ask you to confirm

Click **Yes** to Close a line



Item Info

The item information button will take you to the inventory overview window

The inventory overview window allows quick access to view information on an item.

Inventory Overview - 101145 - Below Zero Pineapple 12x150ml

⚡ Load Totals

🖨 Print

📎 Attachments

✏ Edit Item

🔄 Recalculate

Close

Main Detail

Info

WIP

Stock Available

Pricing Levels

Movement

Sales

Inventory Code: 101145

Description: Below Zero Pineapple 12x150ml

Long Description:

Last Date Invoiced: 2024-07-16 (INV808883)

Last Date Received: 2023-08-17 (GRV391314)

Movement Period for the last: 180

Calculate

All Stock Movement Out: 3

All Stock Movement In: 3

Quantity On Delivery Note:

Detail

Total Quantity In WIP:

Warehouse Transfer WIP:

Detail

BOM WIP:

Detail

Sales Order WIP:

Detail

Invoice WIP:

Detail

Job WIP:

Detail

Stock Request WIP:

Detail

Stock Created Date: 2023-07-06

Total Inventory On Hand: 15

Quantity On Quotes: (-)

Detail

Quantity On Sales Orders: (-)

Detail

Quantity On SO Confirm / WHS: (-) 30

Detail

Quantity On Part Invoices: (-)

Detail

Quantity On Invoices: (-) 13

Detail

Quantity On Invoice Dispatch Stock: (-) 0

Detail

Quantity On Credit Notes: (+) 3

Detail

Subtotal: -25

Quantity On Purchase Order: (+)

Detail

Qty O/S Stock Orders & Receiving: (+) 0

Detail

Quantity On GRV: (+)

Detail

Quantity On Return to Supplier (RTS): (-)

Detail

Subtotal Balance: -25

Stock Request Expected WIP:

Detail

BOM Manufacture Expected WIP:

Detail

BOM Lines Expected WIP:

Detail

Job Lines Expected WIP:

Detail

Final Balance: -25

Sales Order Log

The sales order log tracks and manages sales orders under the sales order quantity confirmation stage

The sales order log gives a trail of what happens to a sales log order under the sales order confirmation

It Looks at who captured the sales order, Action Time when the action took place and Action details

WARNING: BYPASSING WIP RESERVE ITEMS ACTIVE

Sales Order Quantity Confirmation

Attachments Confirm Qty Confirm All Un-Confirm All Confirm Scan Print Picking Slip ScanSKU Print Save Close

Basic Address Shipping Scan Sales Order Log

Page 1 of 1 Paging

Displaying 1 - 11 of 11

#	Captured By	Log Date Time	Action	Action Details	Stock Code	Stock Description
1	Imraan Saljee	2024-08-07 14:30:40	Confirmed All	User Imraan Saljee Confir...		
2	Imraan Saljee	2024-08-07 14:30:34	Started	User Imraan Saljee Starte...		
3	Gerrit van Rooy...	2024-08-02 08:10:24	Stopped	User Gerrit van Rooyen St...		
4	Gerrit van Rooy...	2024-08-02 08:10:20	Started	User Gerrit van Rooyen St...		
5	Gerrit van Rooy...	2024-08-02 08:08:16	Started	User Gerrit van Rooyen St...		
6	Gerrit van Rooy...	2024-08-02 08:07:41	Stopped	User Gerrit van Rooyen St...		
7	Gerrit van Rooy...	2024-08-02 08:07:39	Started	User Gerrit van Rooyen St...		

Page 1 of 1 Add Edit Delete Close Line Show Lines Item Info

Displaying 1 - 7 of 7

#	Sequence No	LS	Item	Description	Order Qty	Available Qty	Confirmed Qty	Invoiced Qty	Balance Qty	Reserved Qty	Qty In Invoice	Bin
1	1		10	Glue Stick	1.00	0	1.00				119.00	
2	2		04-05/3234175	Dektite No8 Di...	1.00	45	1.00				3.00	
3	3		19-04/3048510 ...	Screws 55mm 1...	4.00	82092	4.00			4.00	12 871.00	7H
4	4		Spl2	Solar Spot 50w	2.00	0	2.00				10.00	
5	5		Spl5	Solar Spot 120w	1.00	1	1.00				17.00	
6	6		JBL115B	JBL Stage 115B...	1.00	7	1.00				21.00	
7	7		Spl1	Solar Spot 25w	1.00	0	1.00				10.00	Bin123

Sales Order Close

This function allows one to close the sales order OR close sales order and create a new sales order with the balance quantity.

Close SO	Close Sales Order
Close current SO and create new SO with balance Qty	Closes the current sales order Creates a new sales order with items that have a balance quantity

Sales Order Confirm

Search

Edit

Clone

Reminder

View SO

Stock Request

Process

Close / Cancel

Actions

Print/Export

Basic Search

Custom Search

Expand

Sales Order No:

Debtor Status:

Customer:

Status:

Confirmed And Partially Completed

Description:

Reference:

Date From:

2025-02-10

Date To:

2025-05-11

Overdue Items

0

Today Items

198

Next 7 Days

0

Orders Waiting

Page 1 of 1

Rem

#	Att	Memo	Status	Ship	Printed Pi
1					
2					
3					
4					
5					
6					
7					
8					

Close Sales Order

Close Sales Order:

Close SO

Close current SO and create new SO with Balance Qty

Continue

Cancel

Order Date	Internal Contact	Du
04-09	Malcolm Granville	20
04-07	Peter Smit	20
04-03	Malcolm Granville	20
04-02	Gerrit van Rooy...	20
04-01	Gerrit van Rooy...	20
04-01	Gerrit van Rooy...	20
03-28	Chris Stone	20
03-26	Gerrit van Rooy...	20
03-20	Chris Stone	20