Sales Order Confirm

Sales order confirm (Warehouse Dispatch)

- Sales Order functions
- Sales Order Confirm Qty
- Sales Order Unconfirm Quantity
- Sales Order Picking Slip logs
- ScanSKU Confirm
- Sales Order Confirm Search
- Sales Order Confirmation Functions
- Sales Order Log
- Sales Order Close

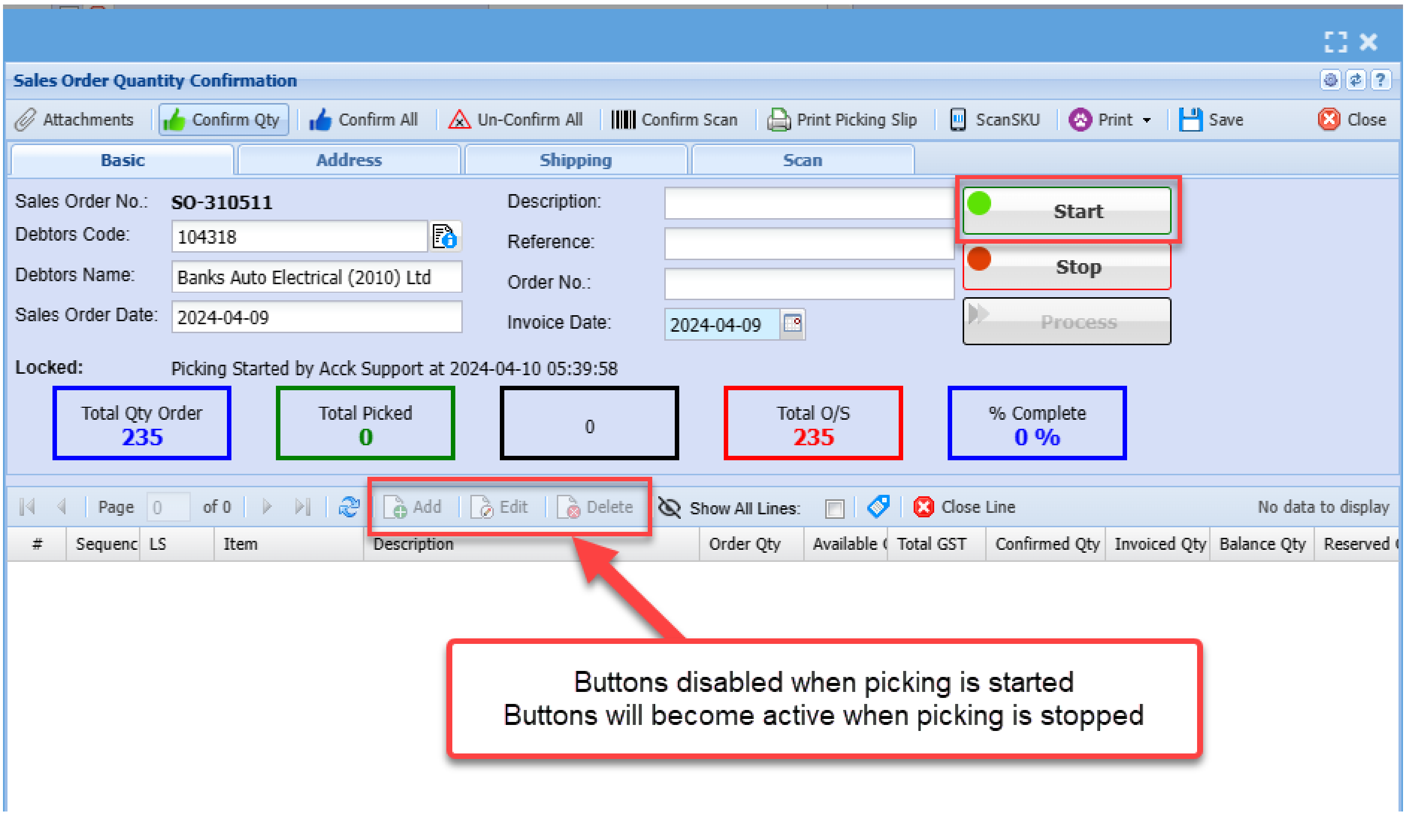
Sales Order functions

Multiple functions for Sales Order Confirm

Picking started

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

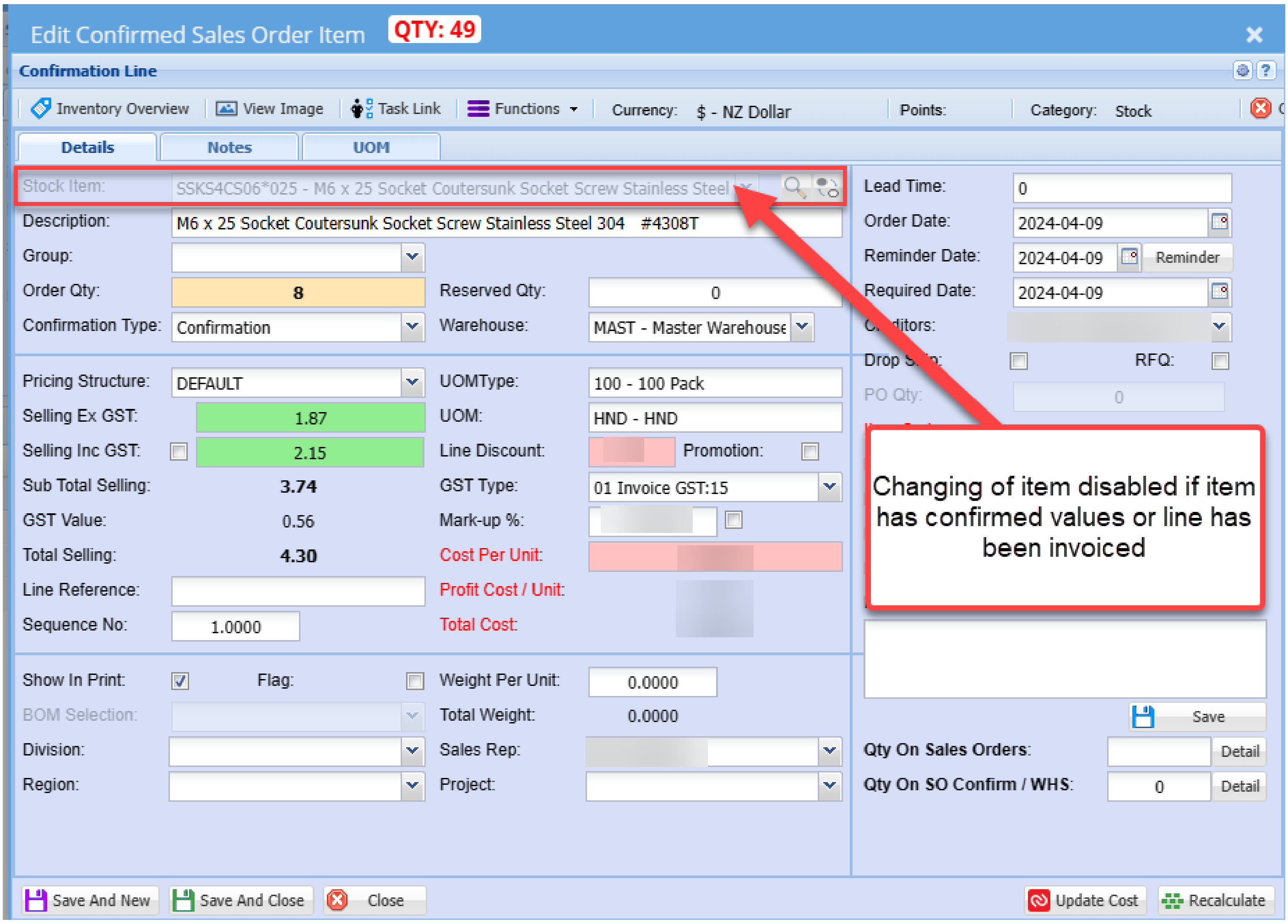
One can only add or edit items when not picking



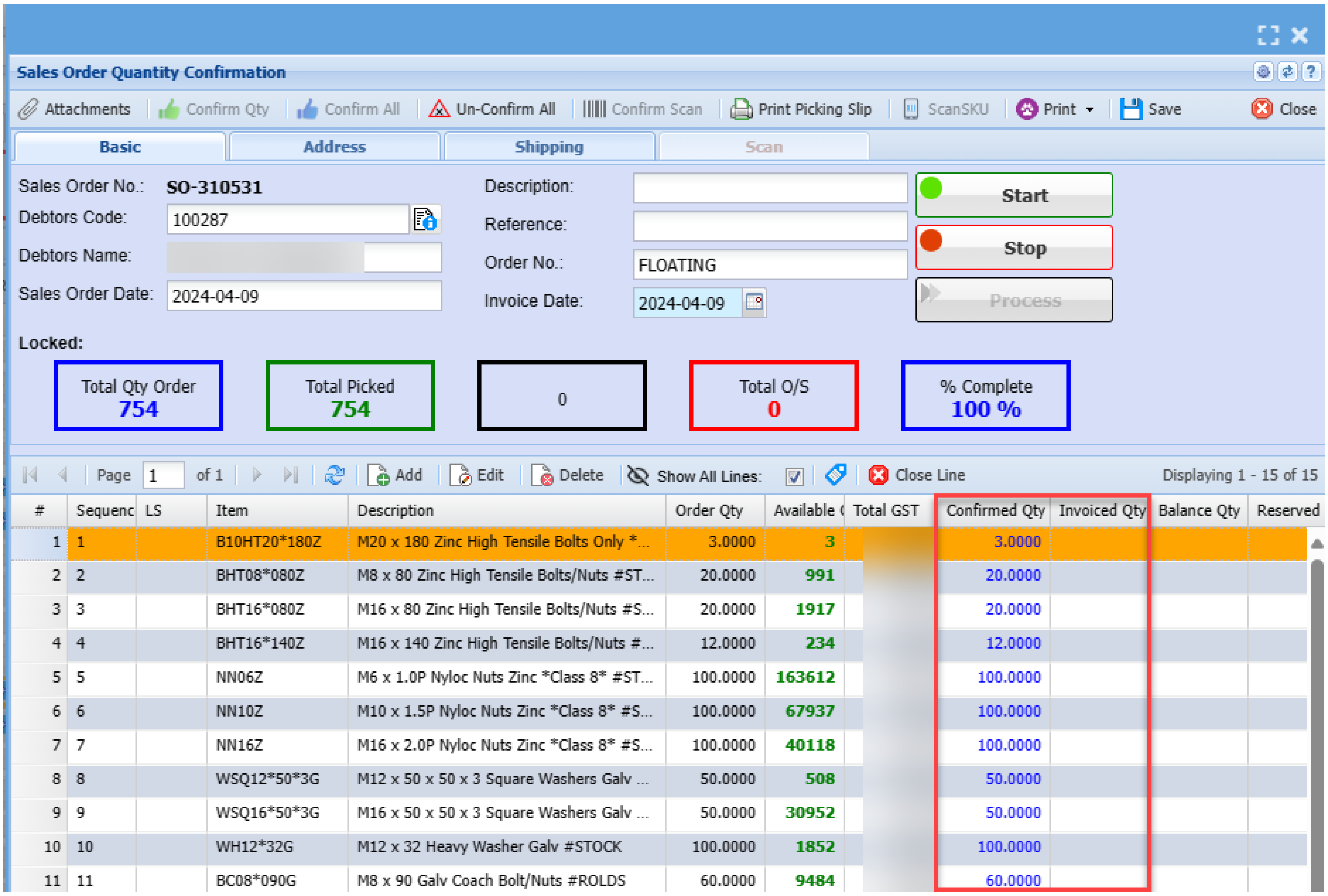
Sales Order code disabled

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



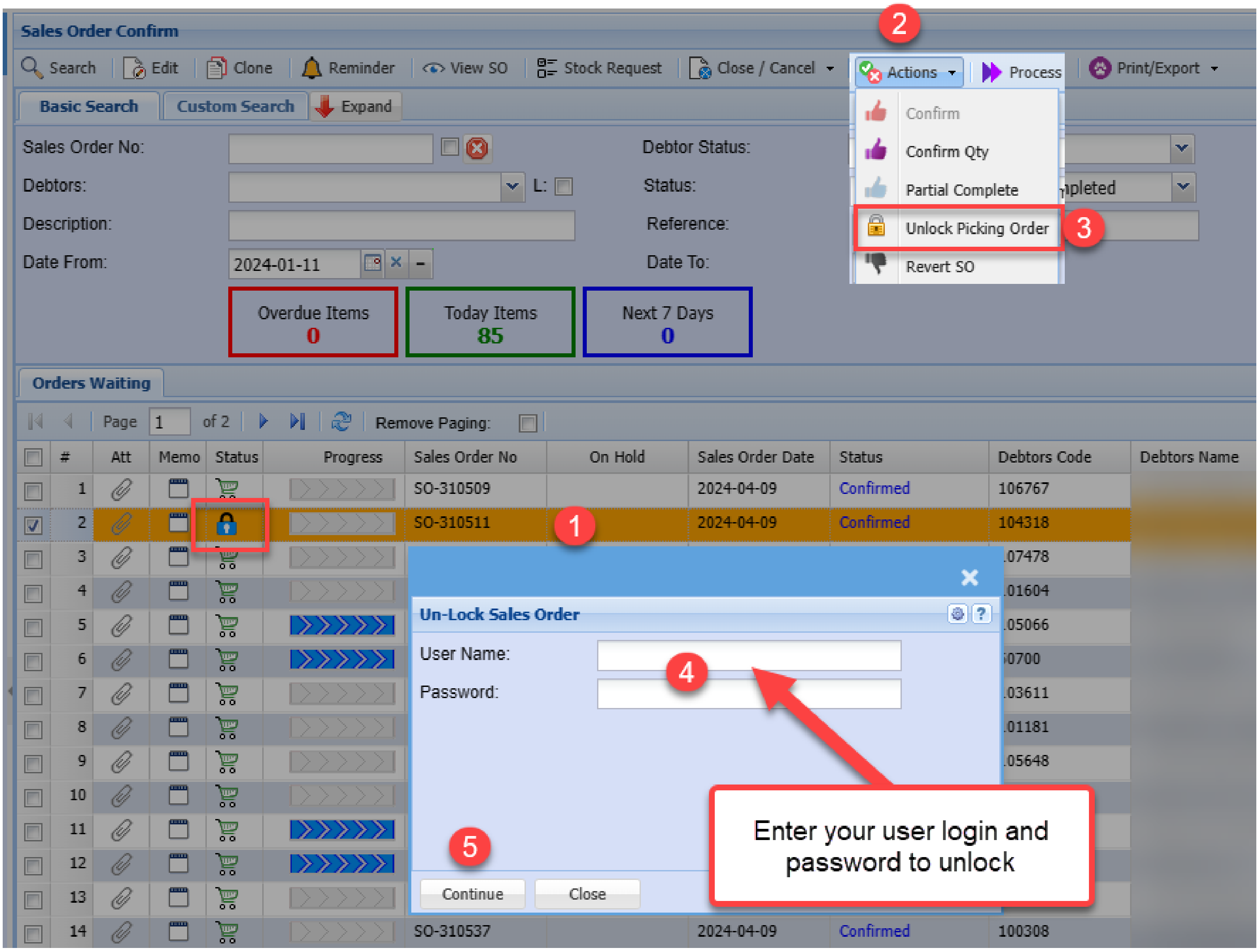
Lines items disabled on confirmed and invoiced quantities



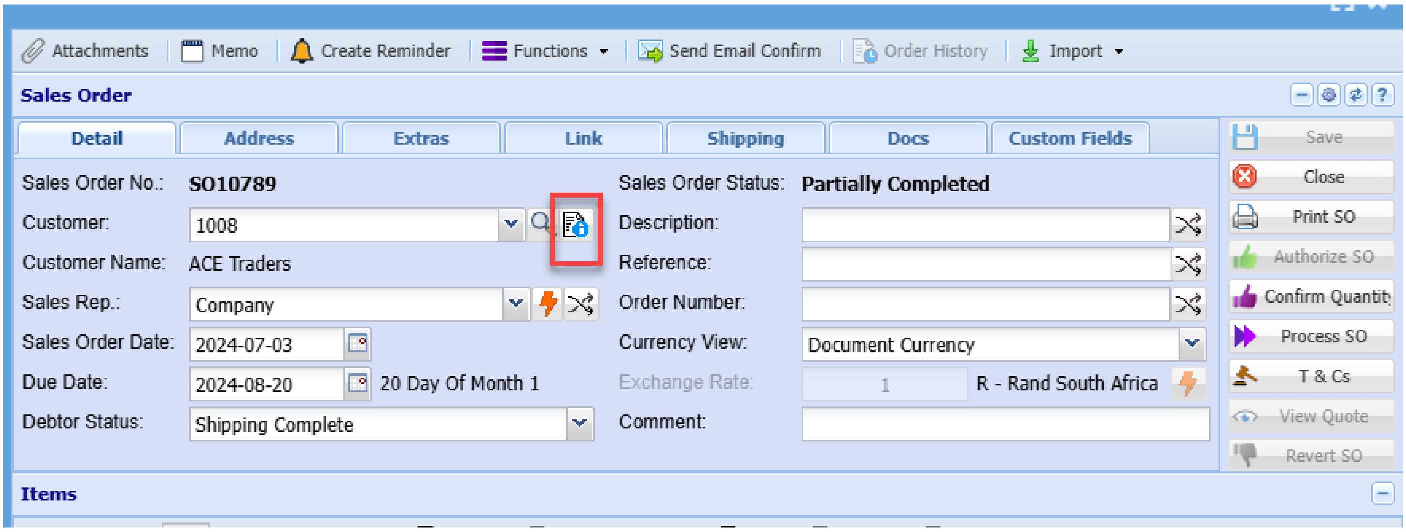
Unlocking a Sales Order in Started picking state

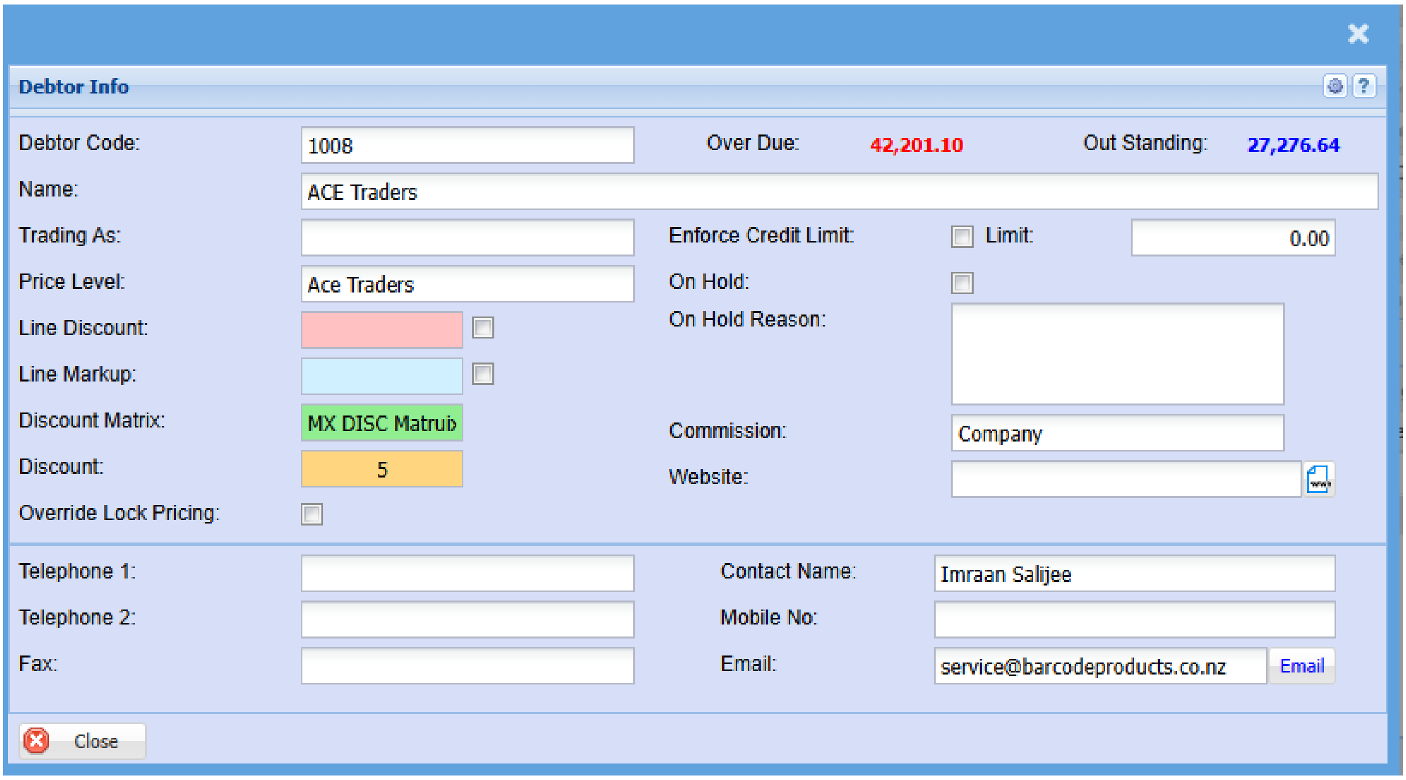
When a sales order is has a blue lock, it means that it is in the process of been picked and is locked by the user picking.

To unlock the sales order, unlock

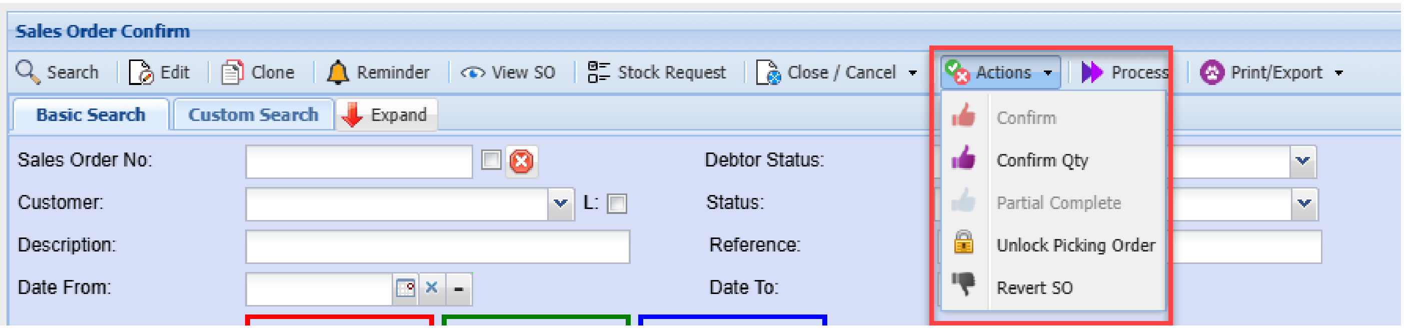


Debtor Info

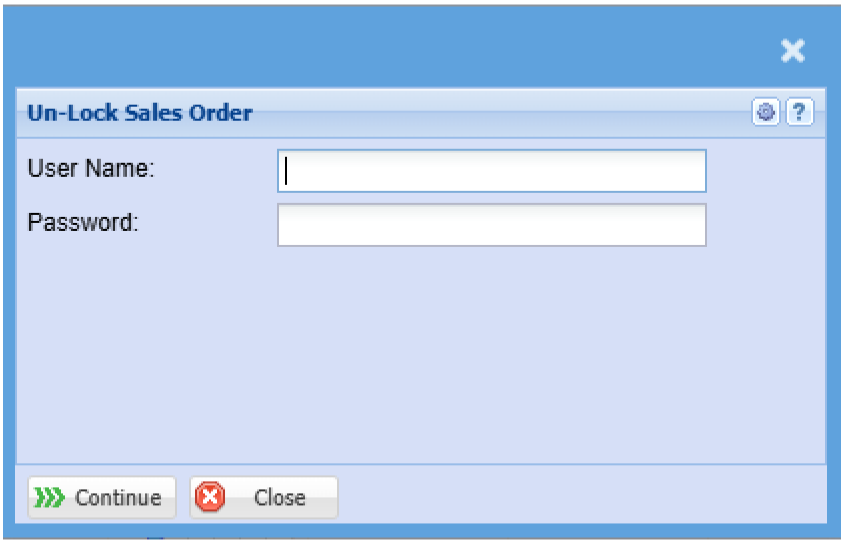




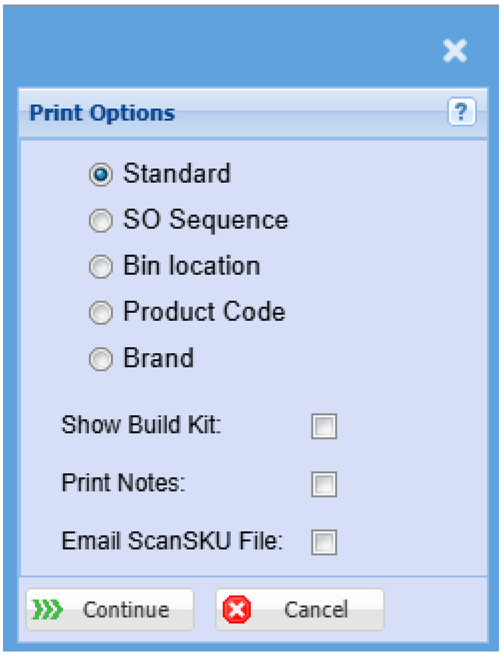
Actions



Unlock Picking Order



Print Picking Slip



Sales Order Confirm Qty

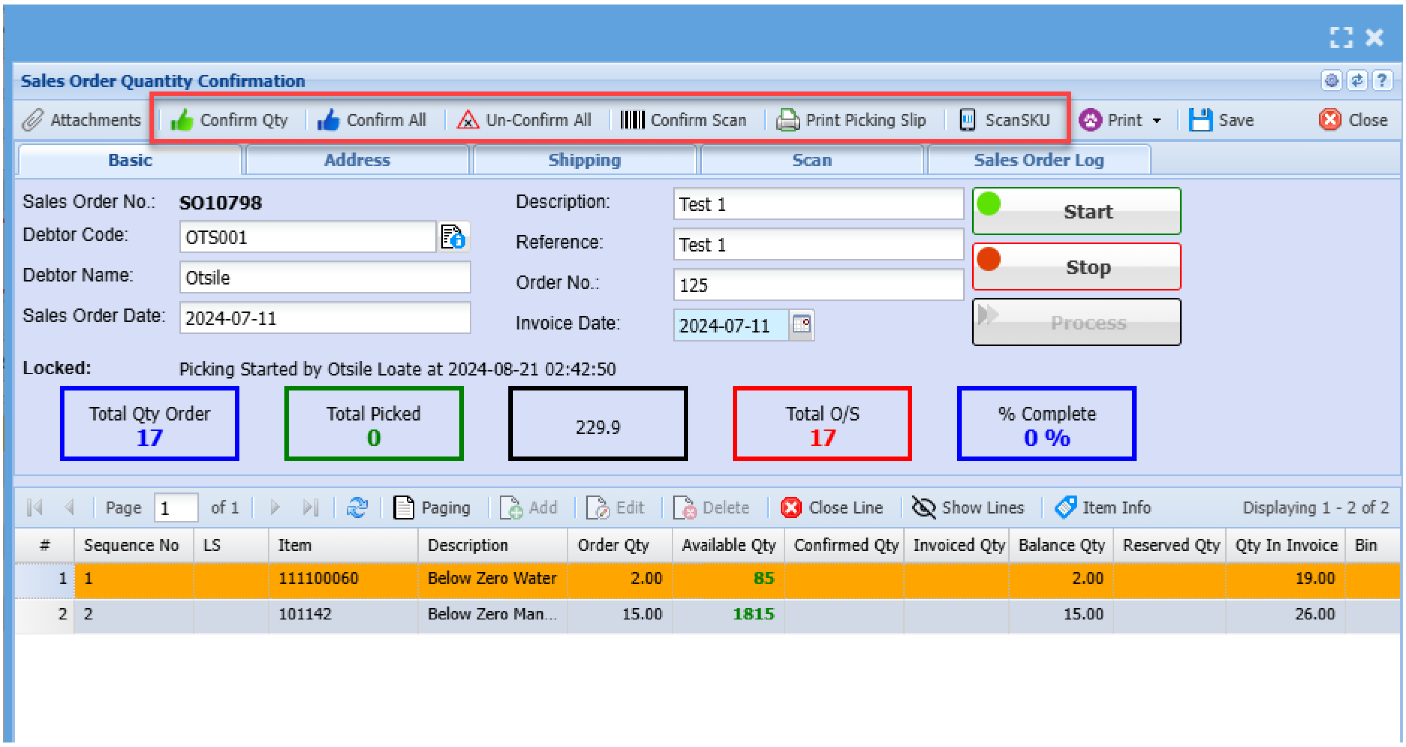
Confirming your quantity on the sales order can be done in multiple ways.

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



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

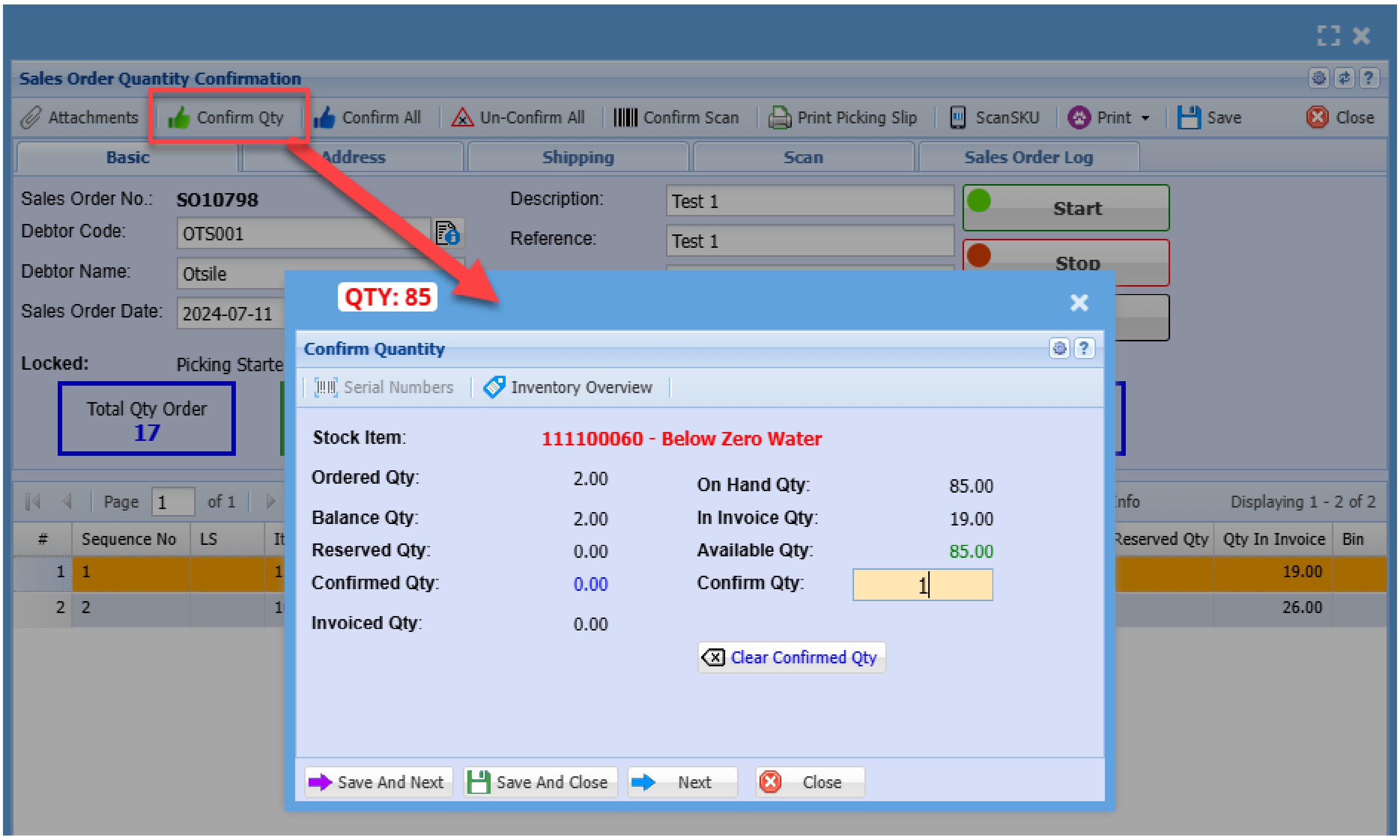
Click confirm qty

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

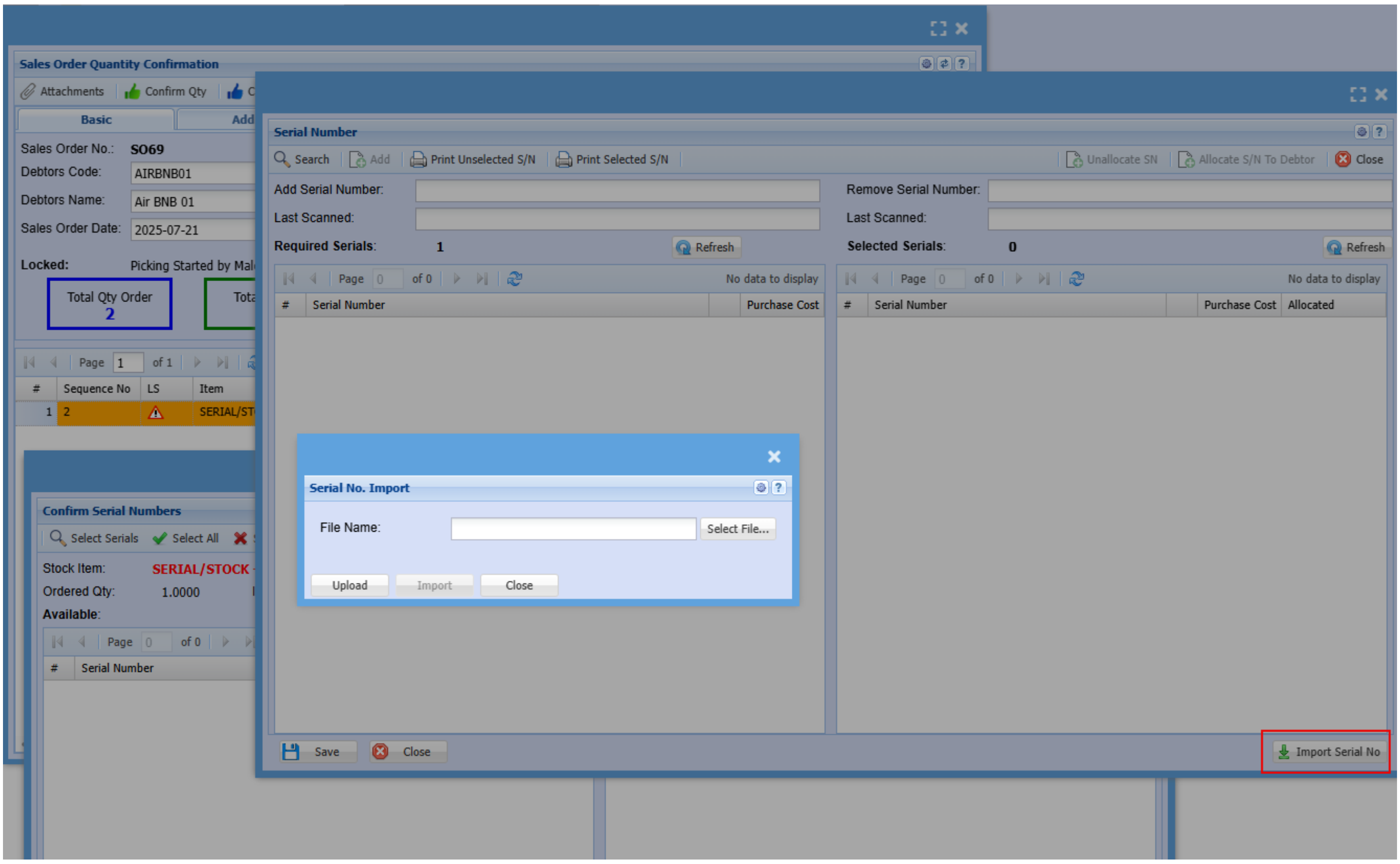
Click qty add the quantity you want to confirm then save and new to confirm a new stock item



Serial number confirm and import

File is a .csv file layout

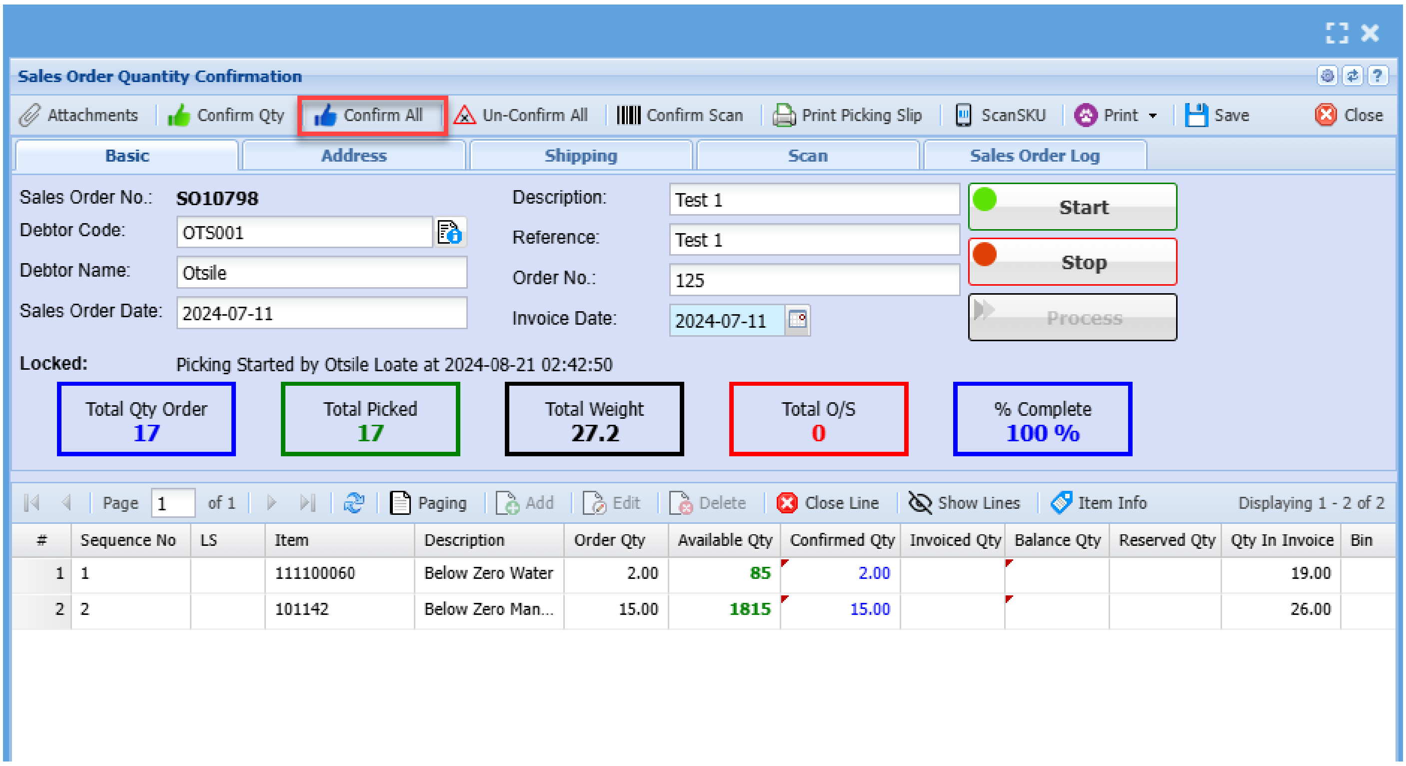
First column is SerialNumber



Confirm All

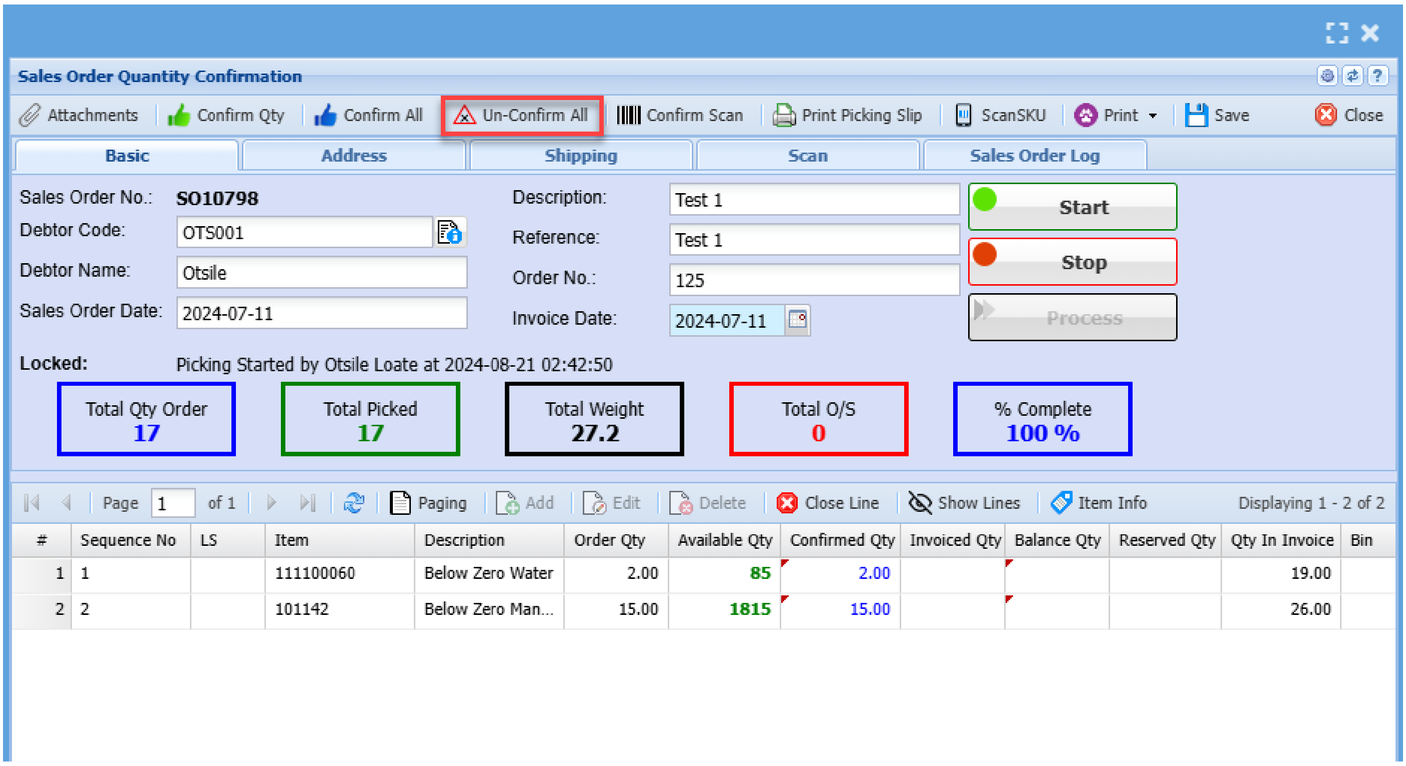
This is a quick button to confirm that all quantities on the sales order are fully received.

Click here for a step-by-step manual on un-confirm All



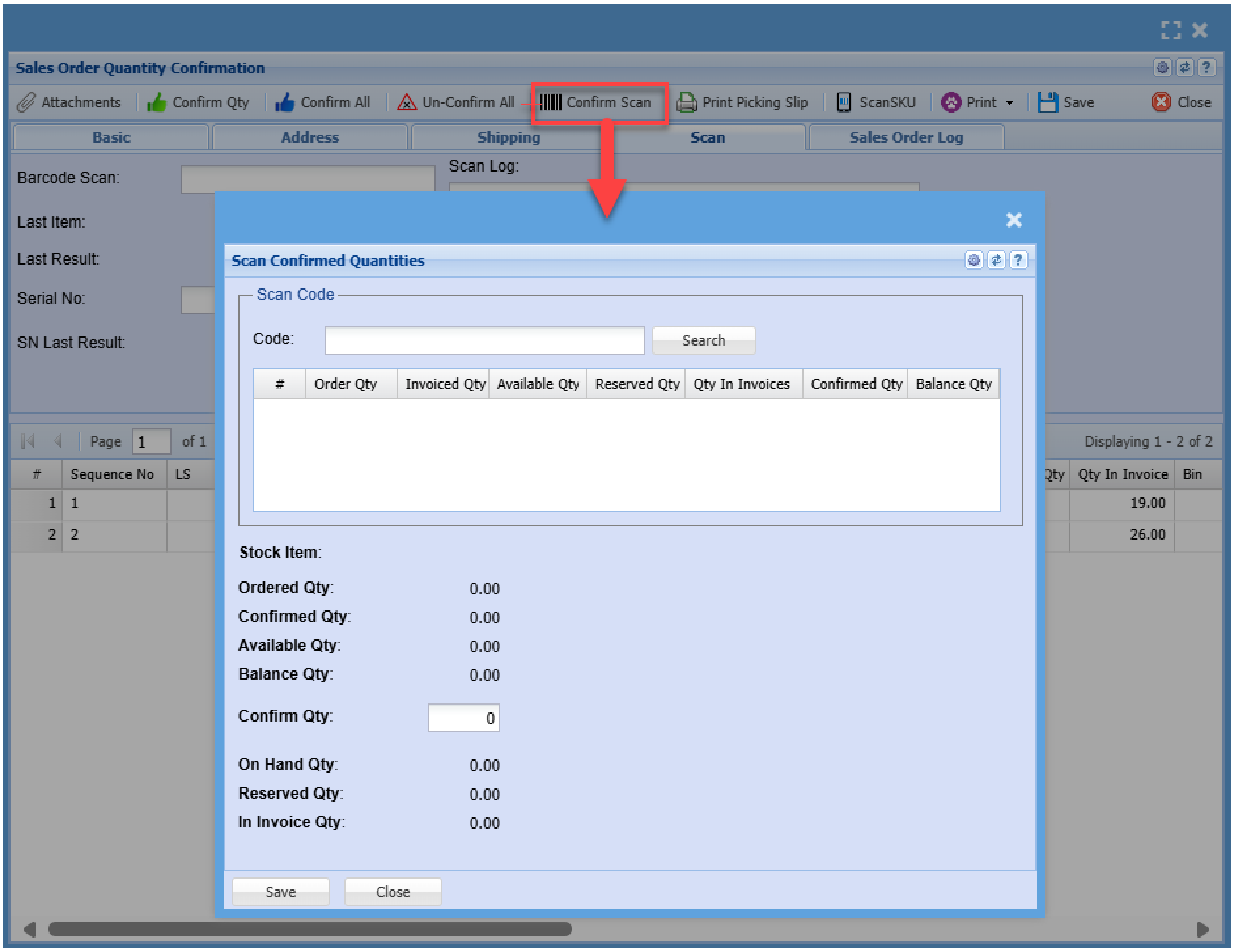
Un-Confirm All

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



Barcode Confirm Scan

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

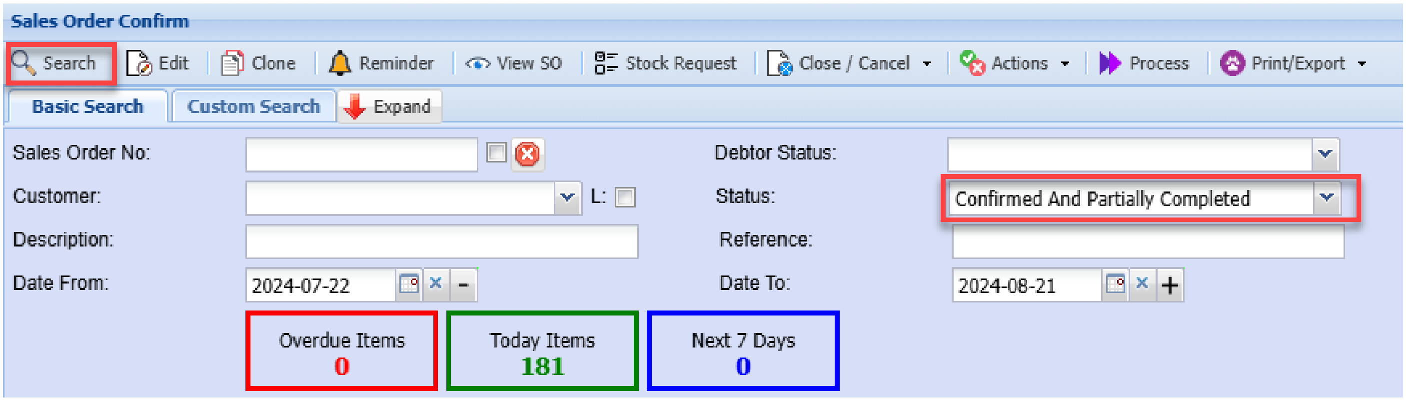


Sales Order Unconfirm Quantity

Go to Debtors Module> Activity> Sales Orders

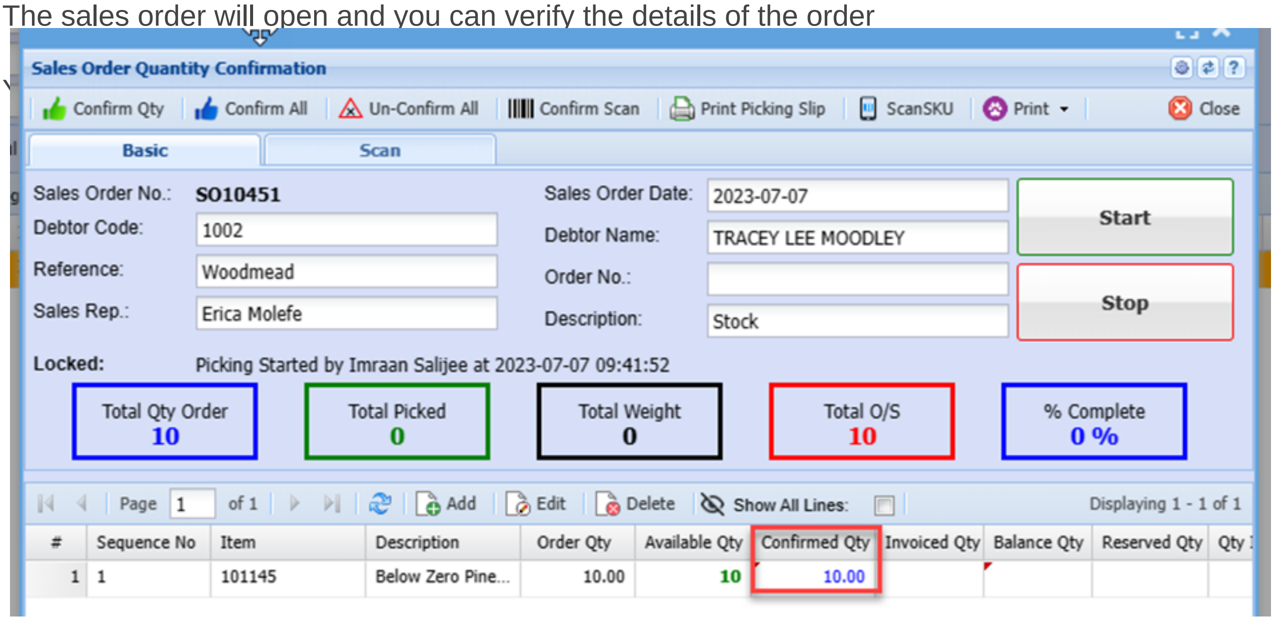
Search the required Sales order

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



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

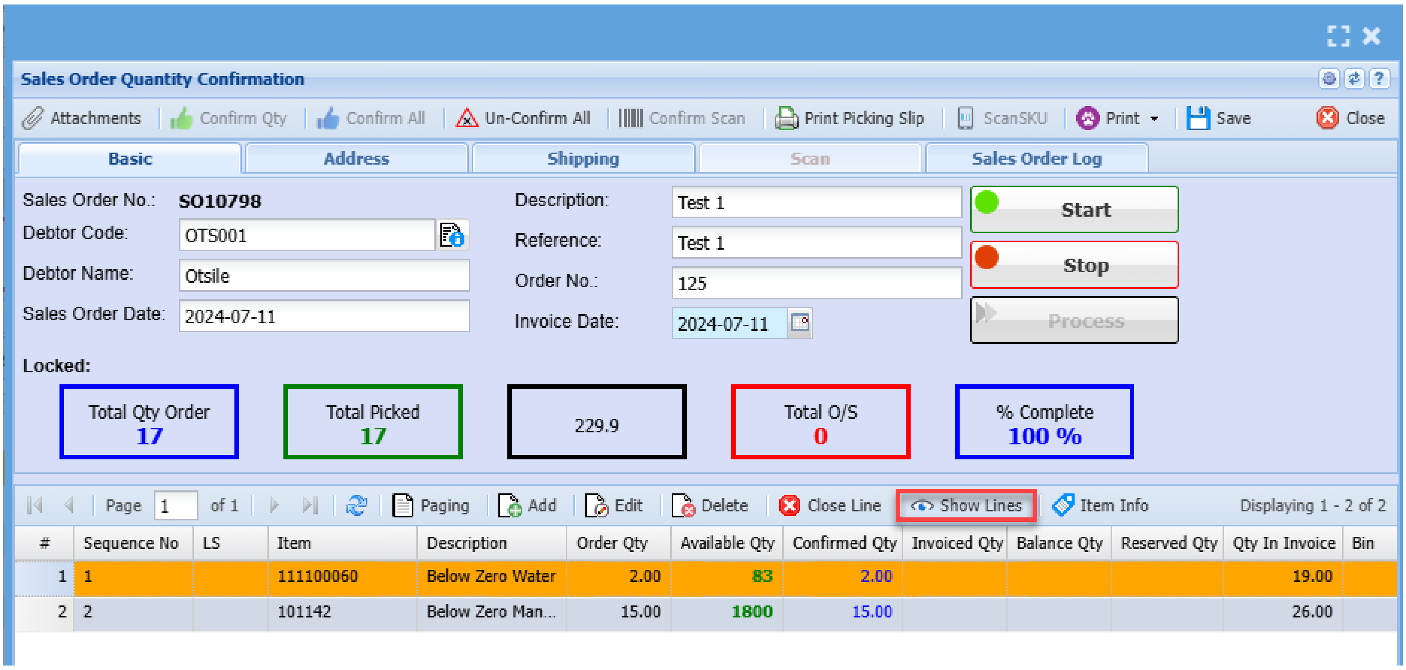
The sales order will open and you can verify the details of the order



> 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 largeorders with many item lines.

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

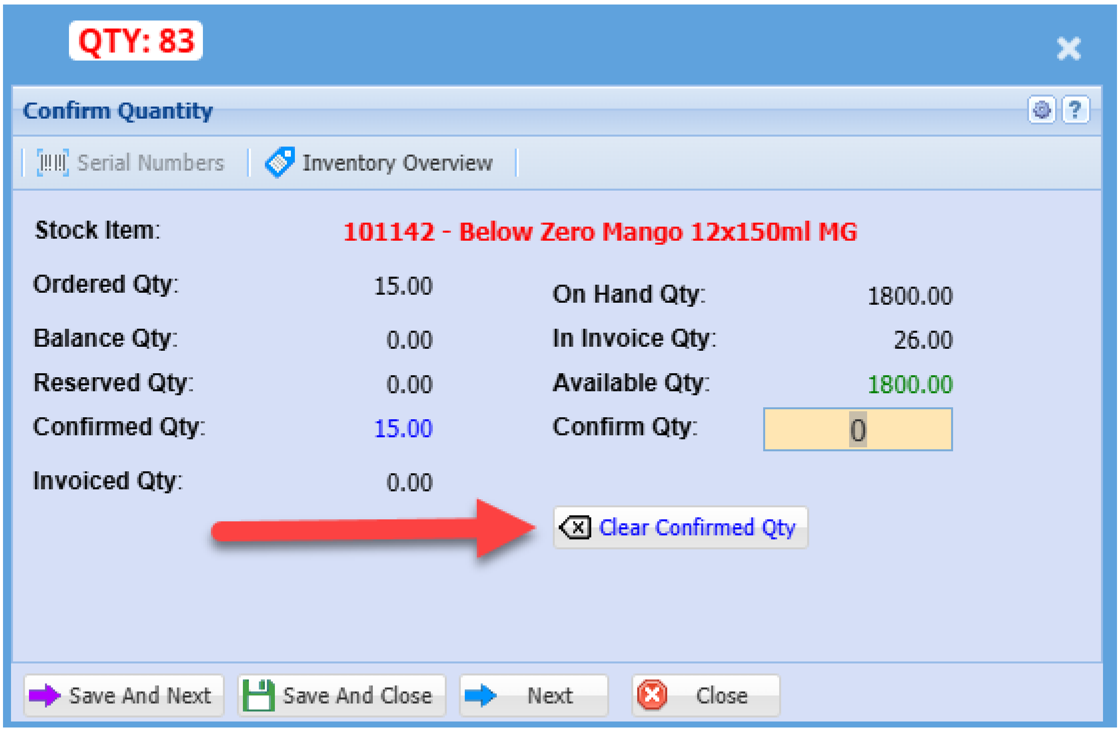
This displays all the sales order item lines



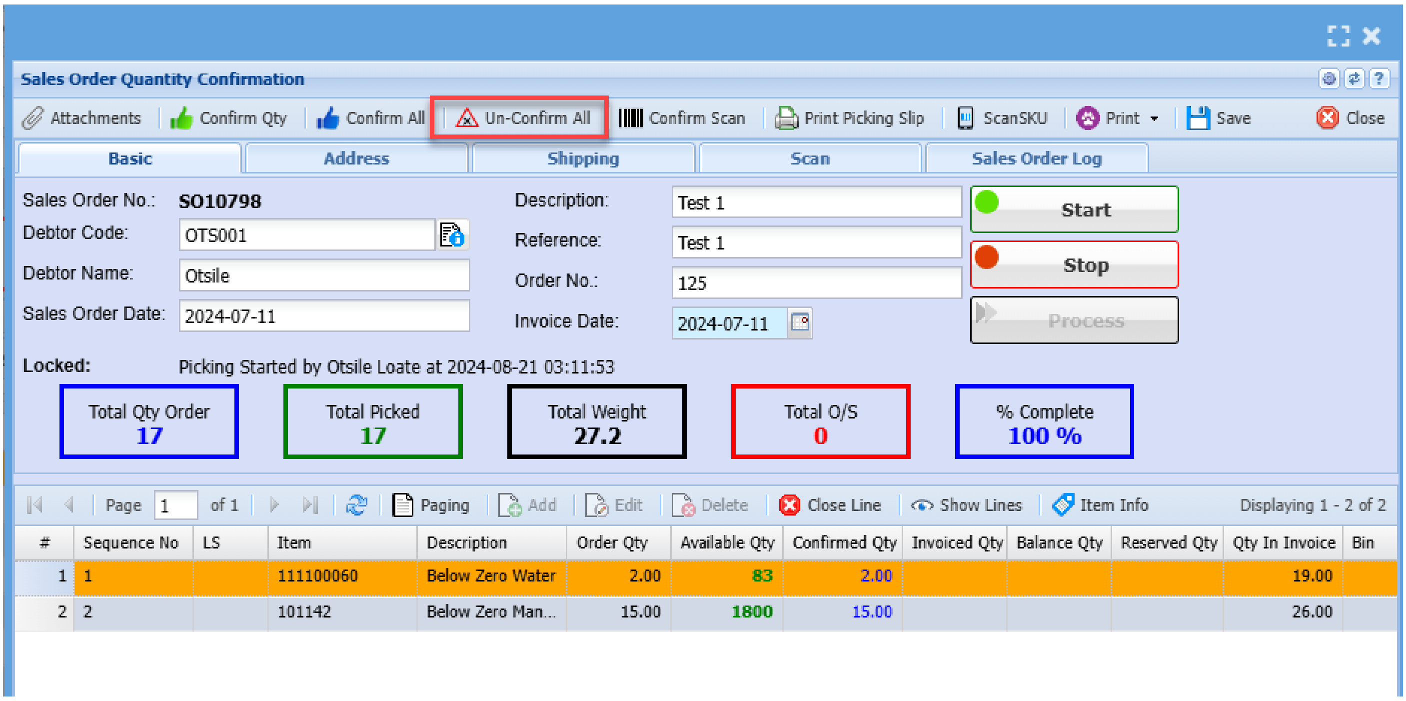
You can then search for the item you wish to un-confirm quantities on

Double-click the line

Click the Clear Confirmed Qty Button



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



You can then reconfirm the items with amended quantities, or

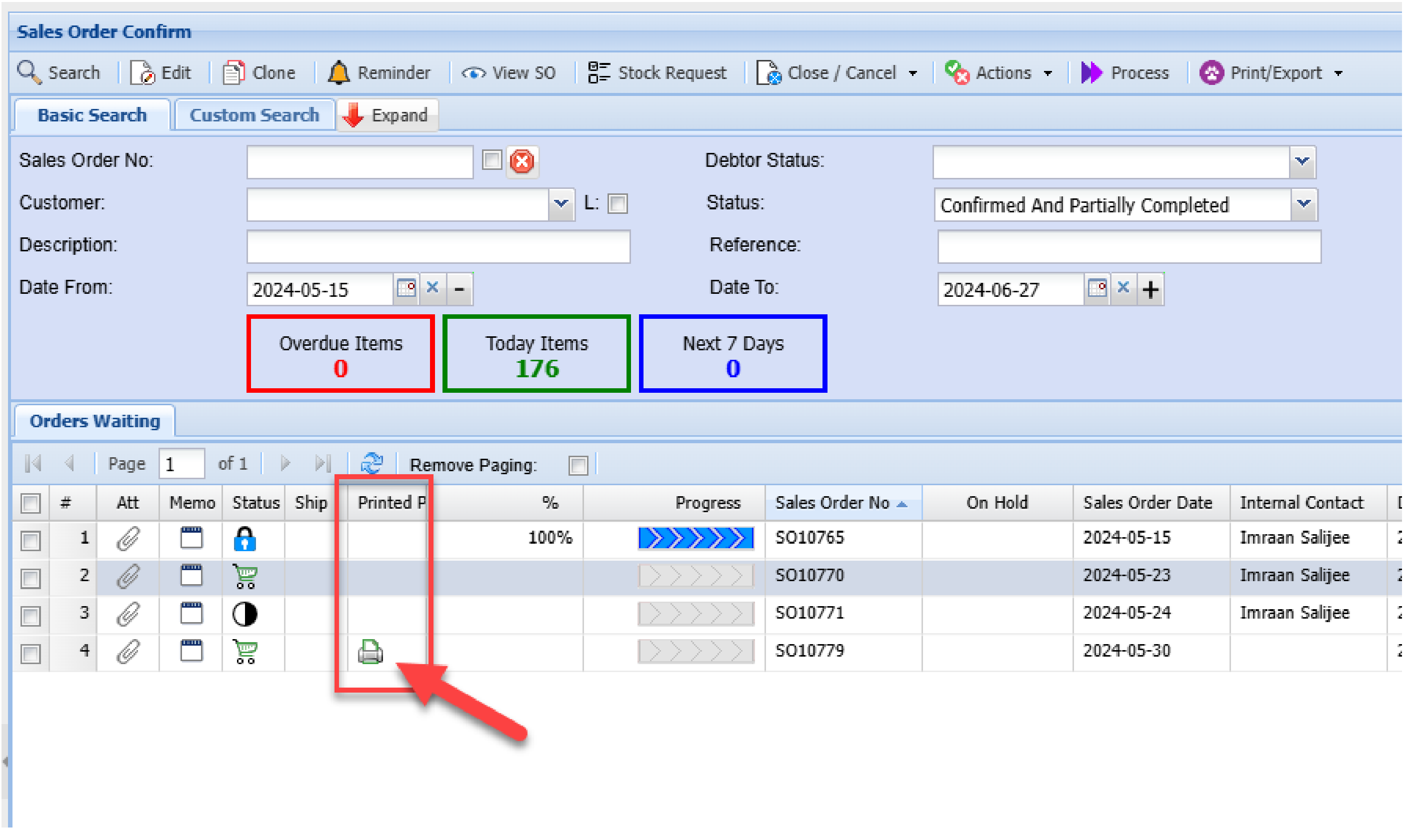
You can Unauthorise the sales order and this will allow you to edit the line items and add addition items if need be.

Sales Order Picking Slip logs

When confirming a Sales Order and printing a picking slip.

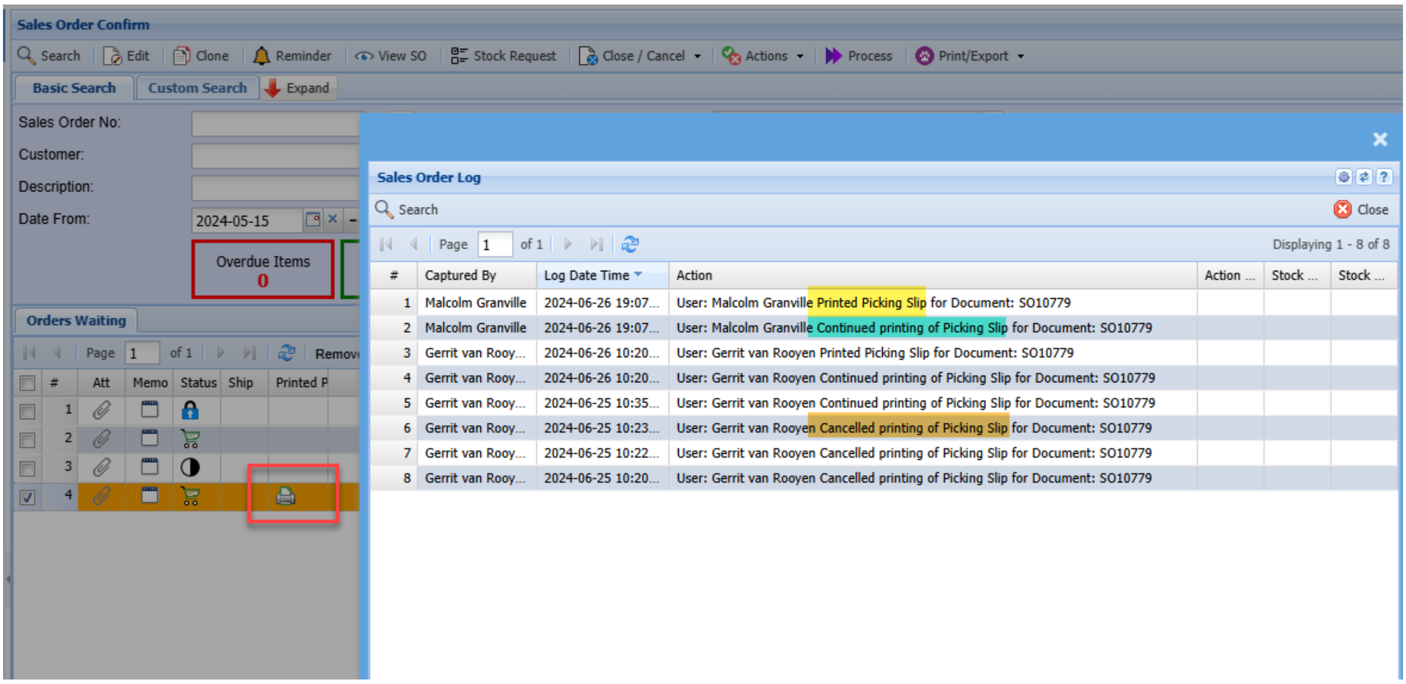
Logs will be created to on picking slip screen and print picking slip.

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

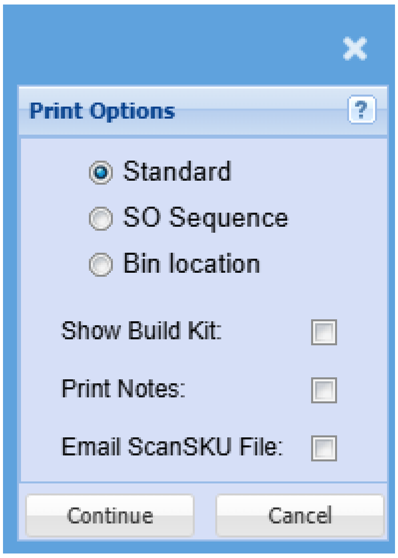


Clicking on the icon will open up the sales order log file

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

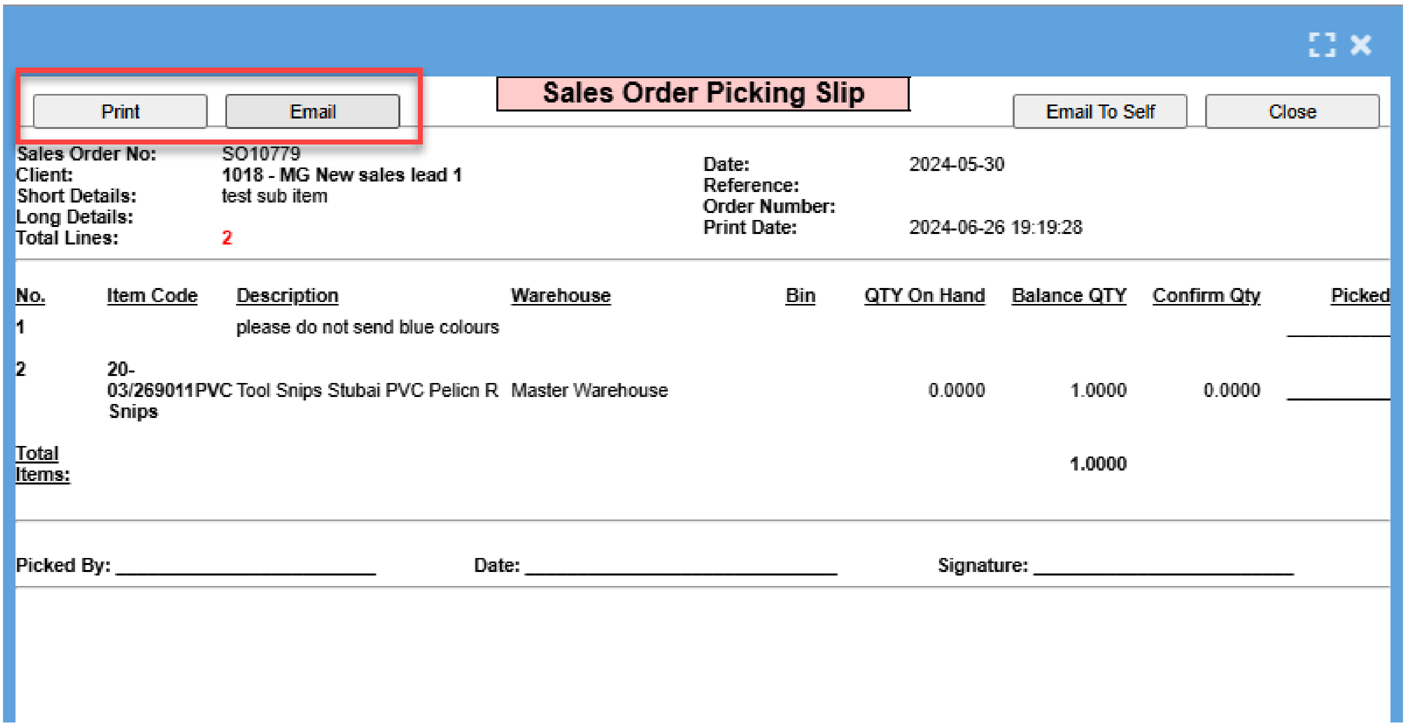


The log will log on print options for both Continue and Cancel buttons



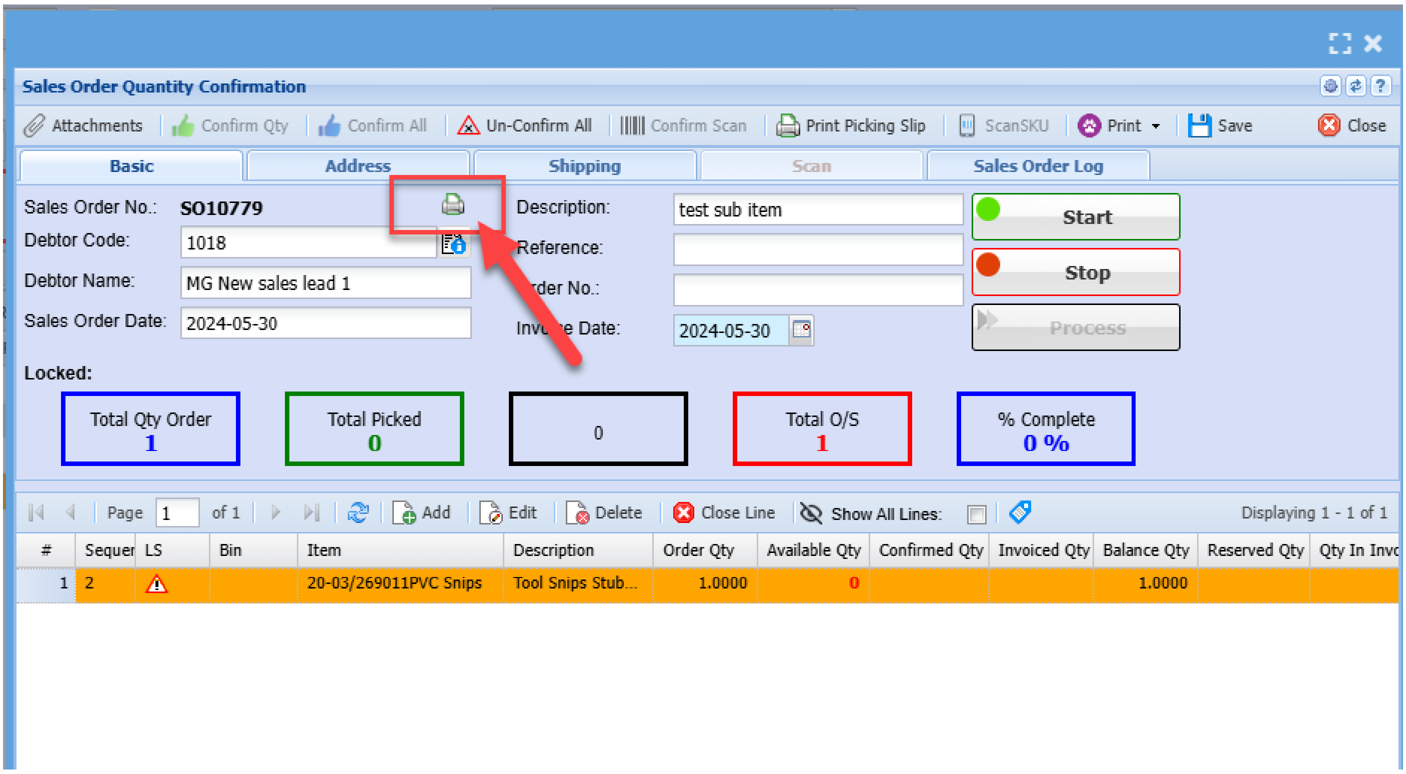
The log will log for Print and Email buttons

> Print button logs that the user clicked on the print button, however this does not mean that they physically printed the document. As they could have cancelled the print button in windows.

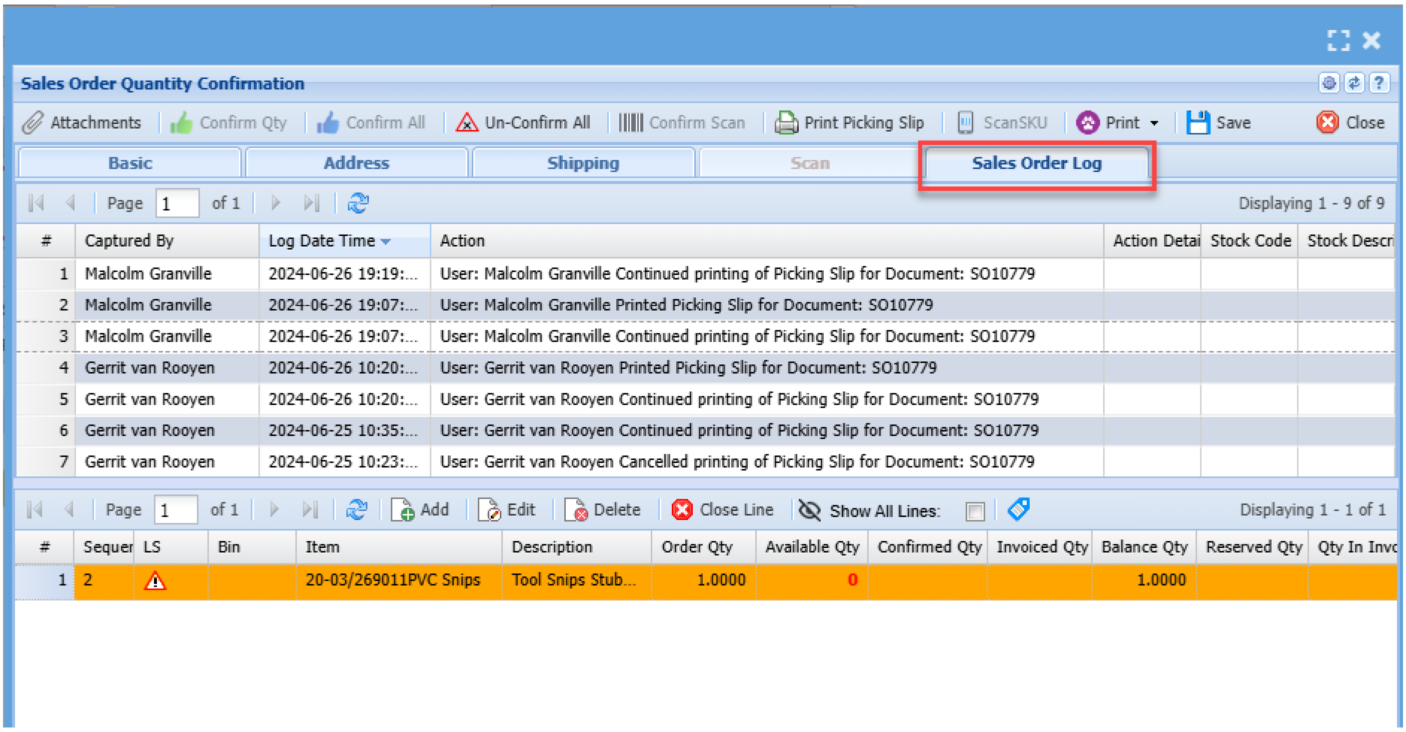


Sales order print indicated

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

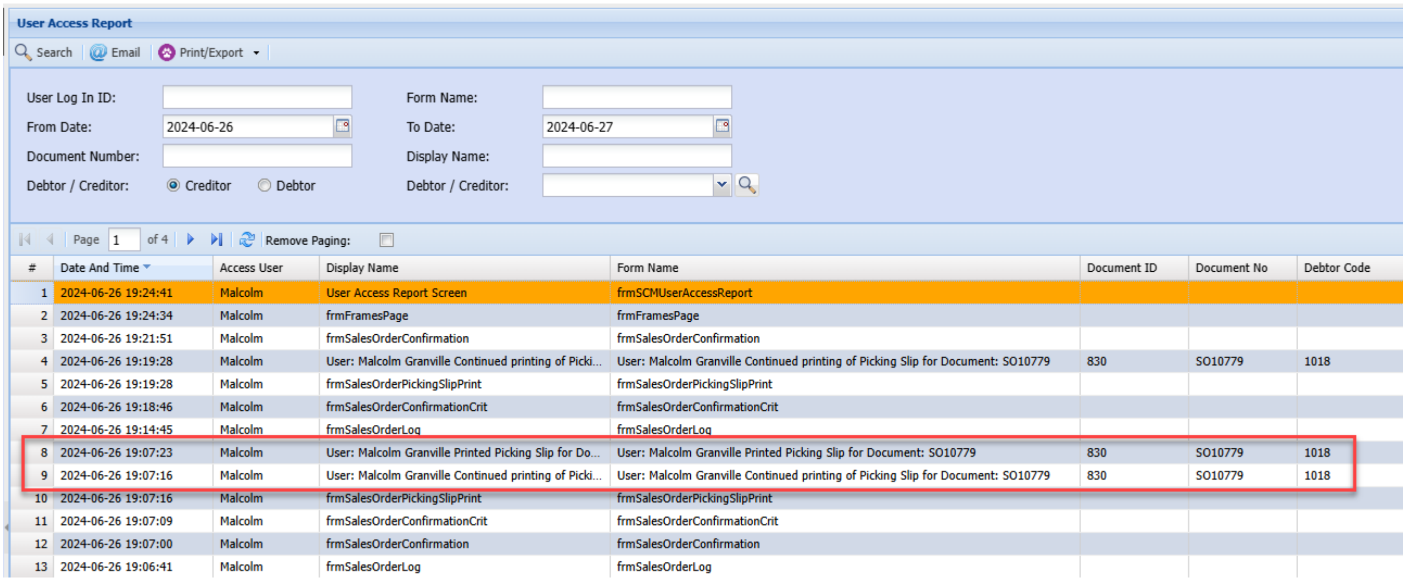


The sales order log tab will indicate the logs on the sales order



User Access log

Logs are recorded in the user access log



ScanSKU Confirm

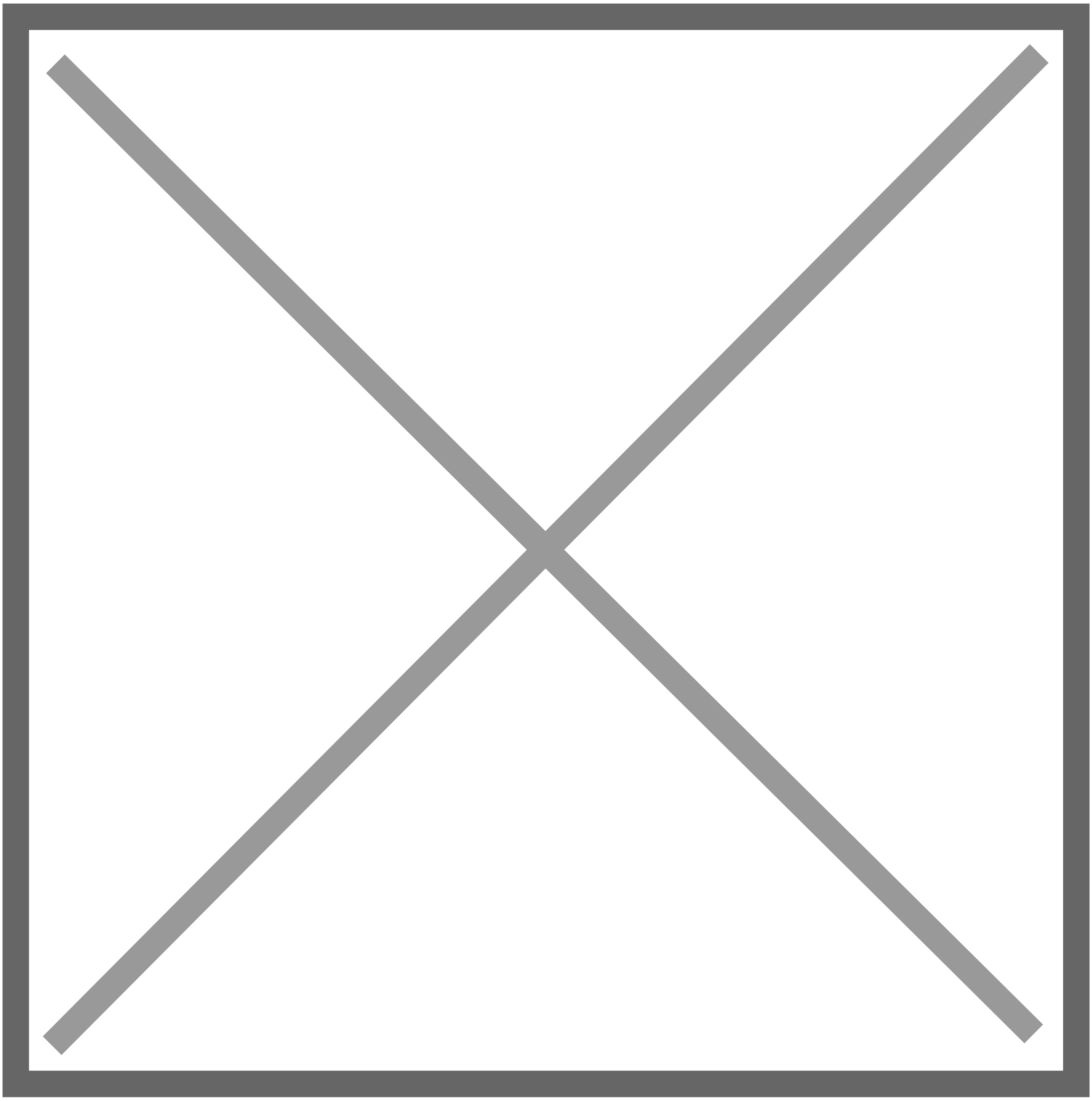
Using a ScanSKU scanner

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



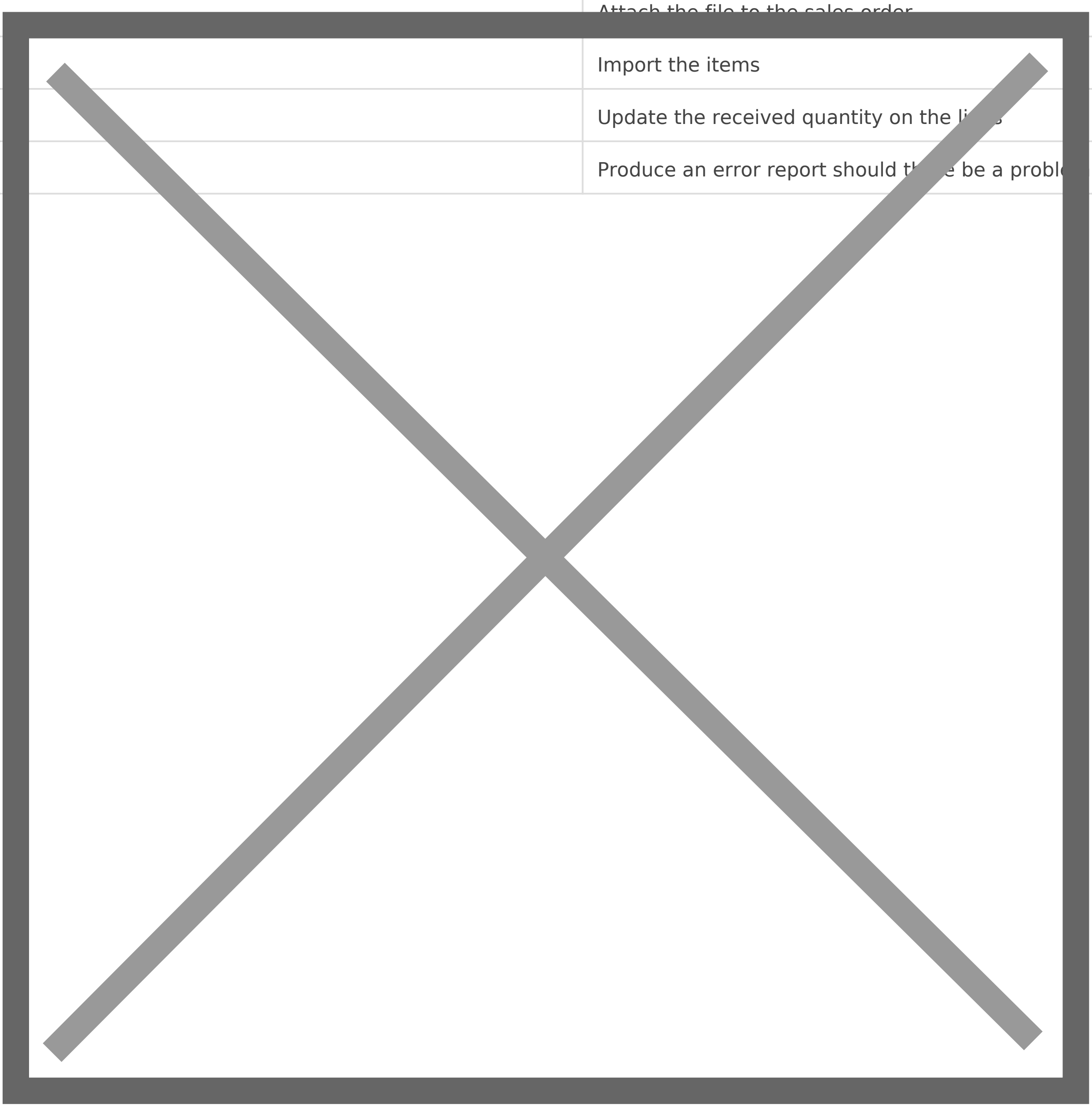
Import ScanSKU file

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

Drag directly from your email into this section

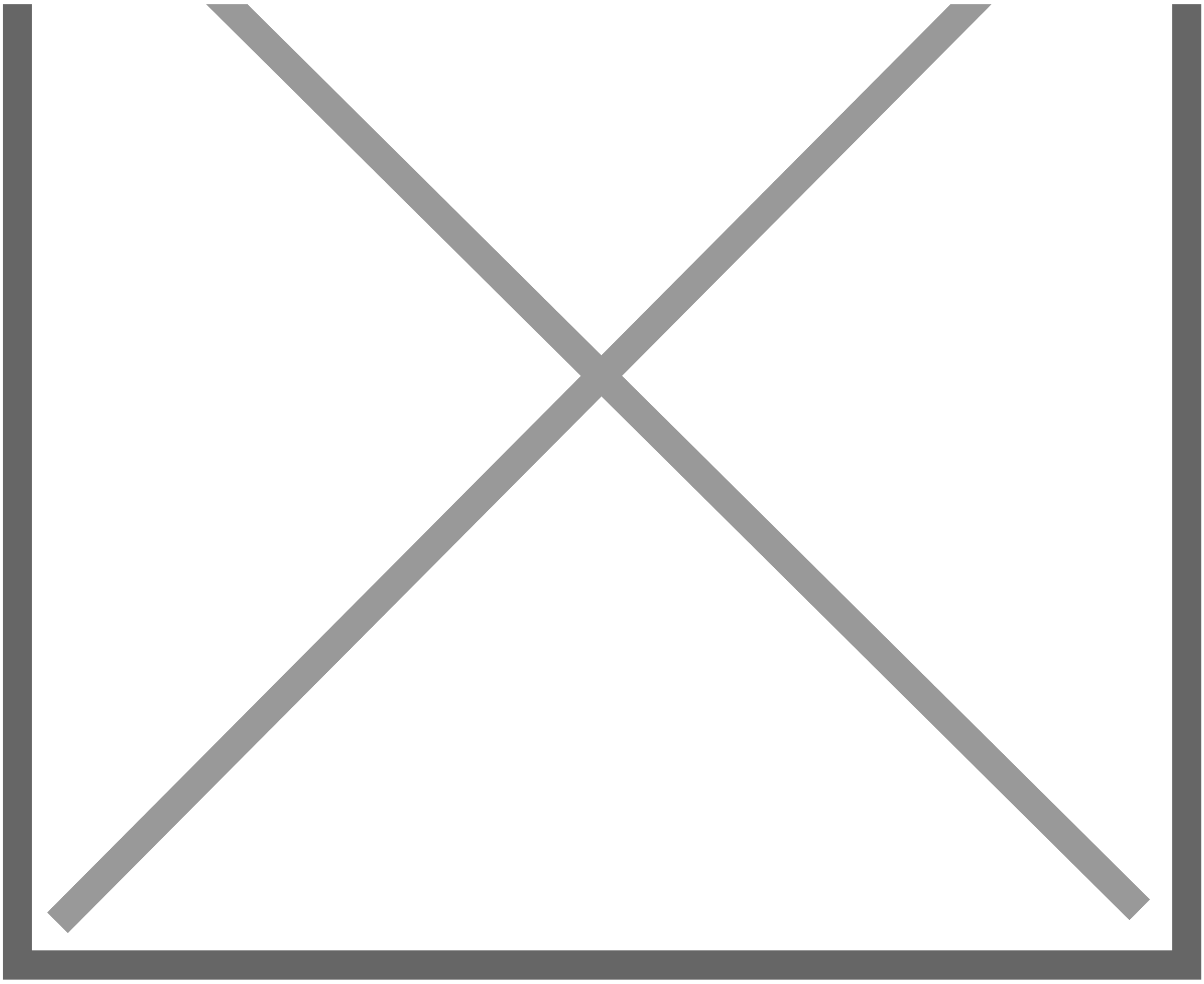
The file will do the following:

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

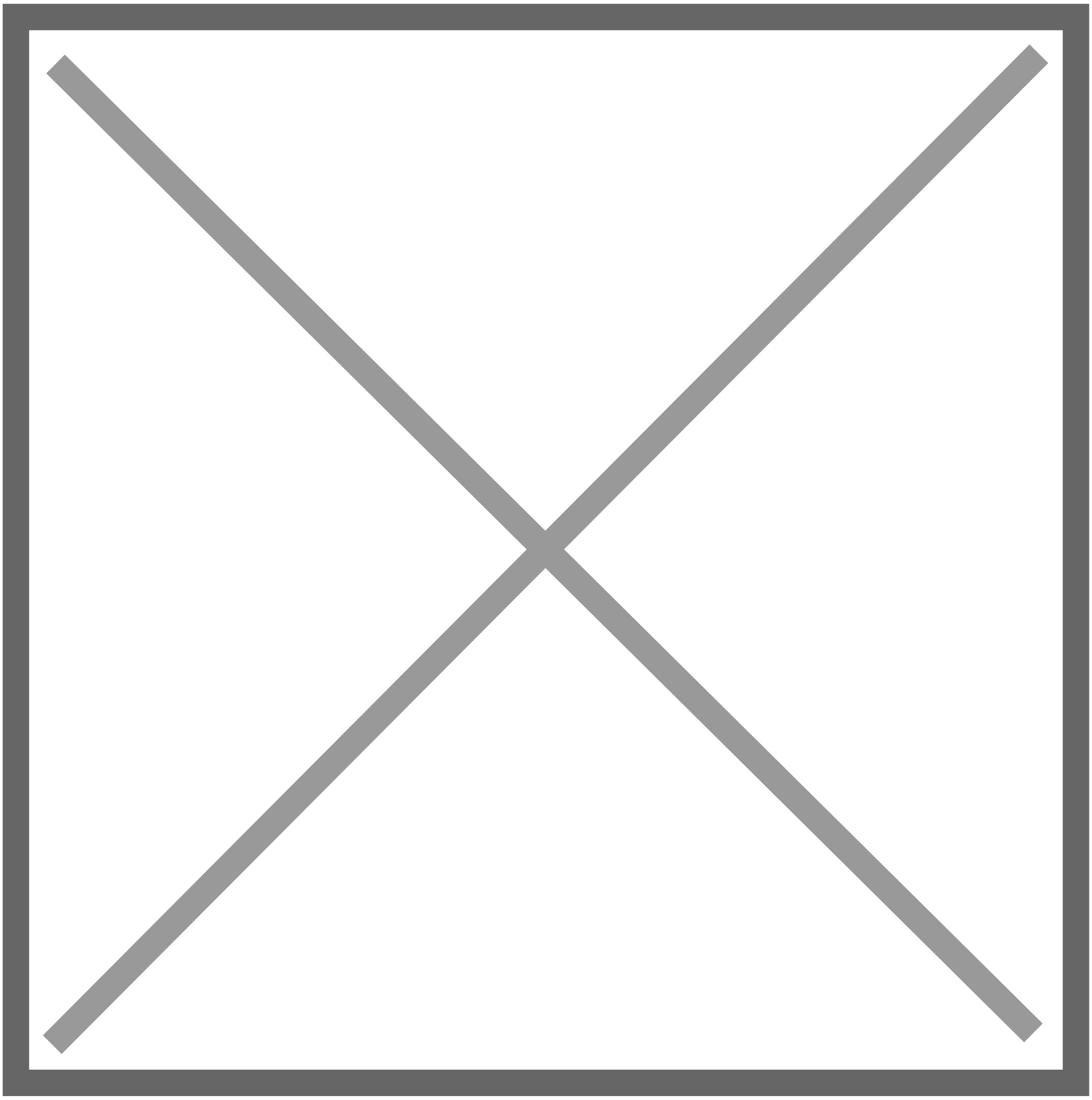


ScanSKU email setup per user

Go to System Configuration> General> User Setup

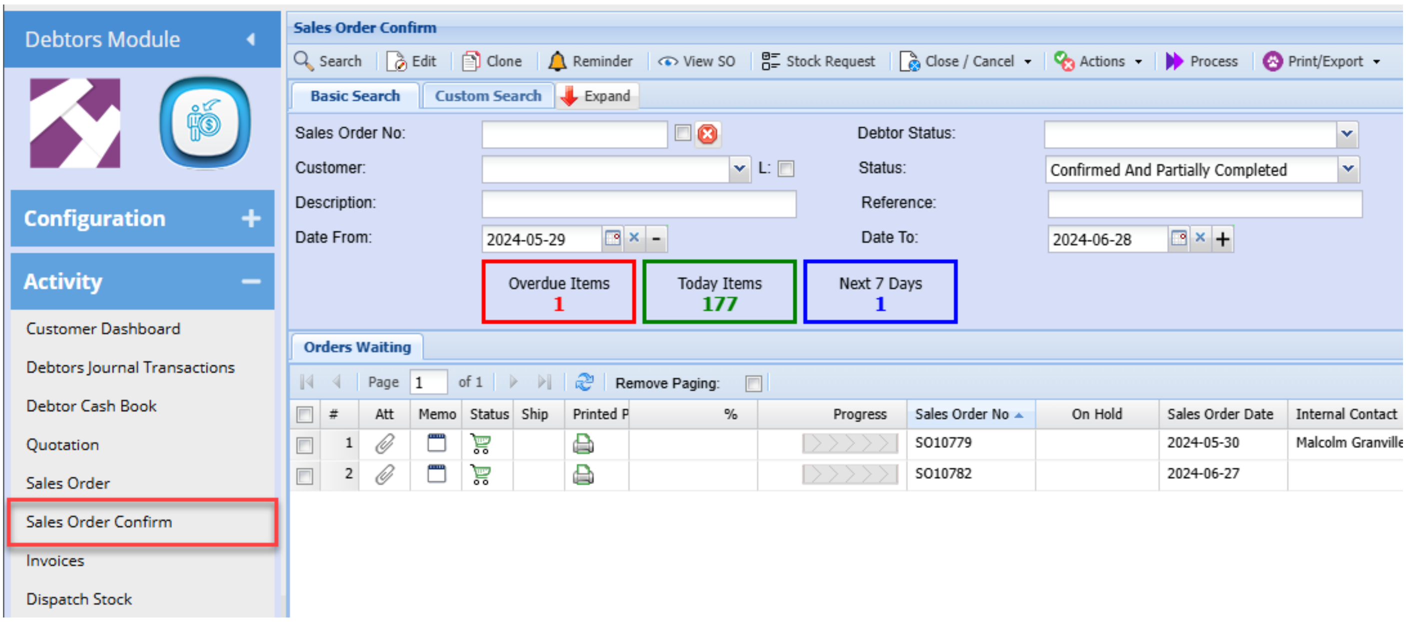
Each user can have a unique email address to send to for their specific scanner.

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



Sales Order Confirm Search

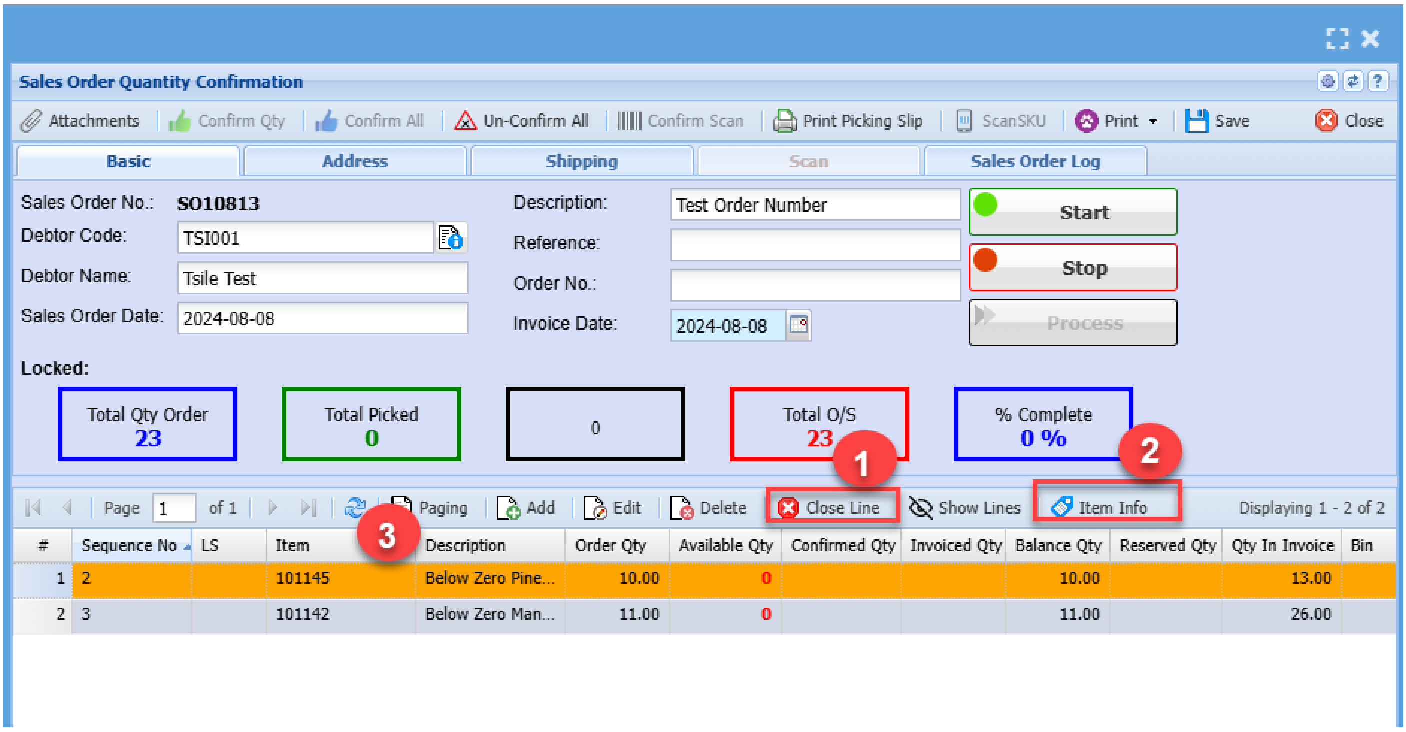
Confirmation search screen is where confirming of picking of stock is done. Generally in the warehouse.



Sales Order Confirmation Functions

Sales order confirmation the following function was recently added

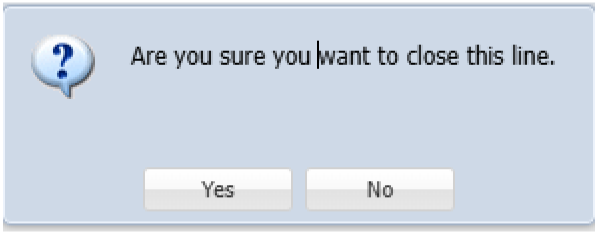
1. Close button function
2. Item information button
3. Sorting on columns - This allows you to sort by column when clicking on the column



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

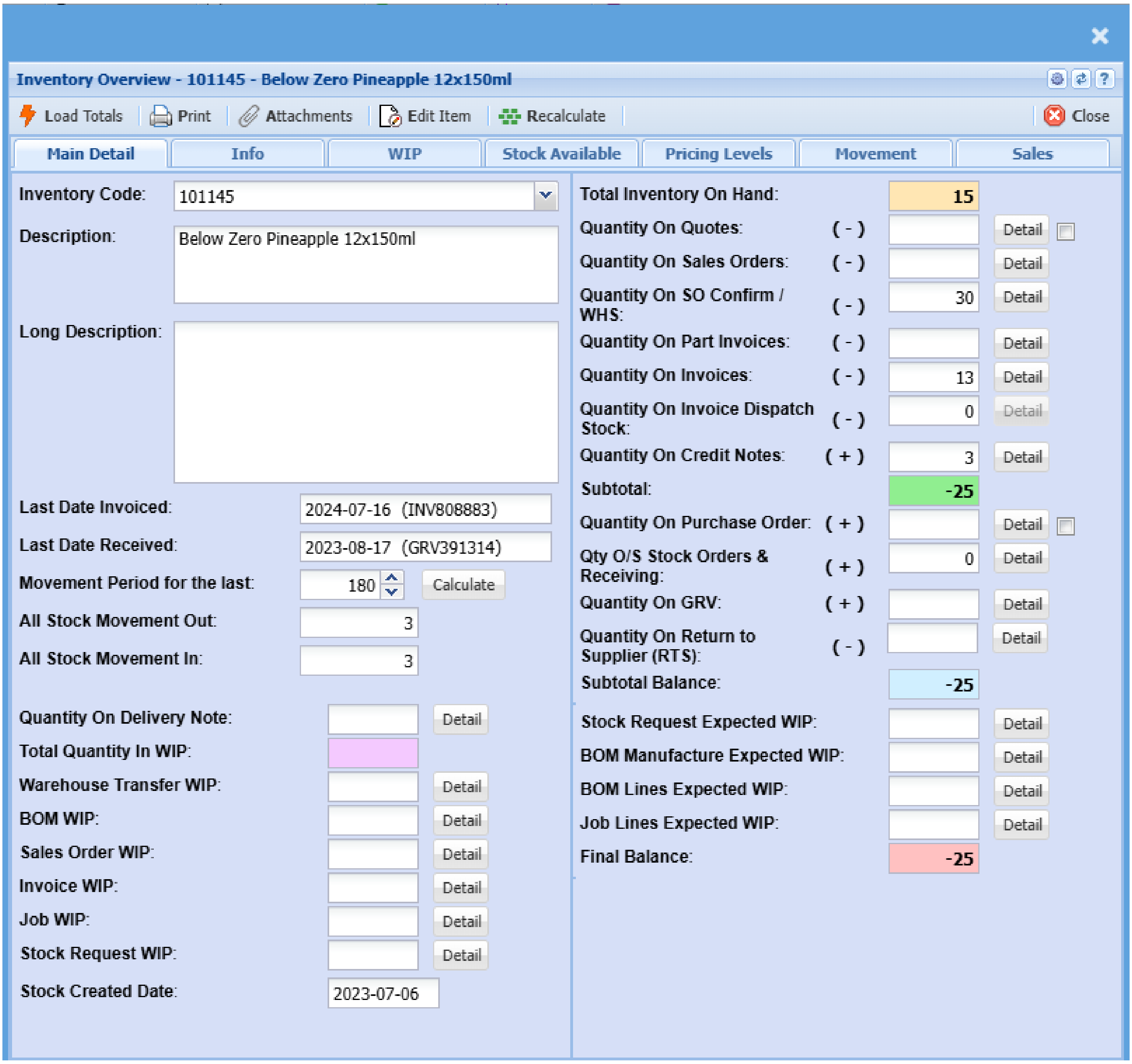
Click **Yes** to Close a line



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.

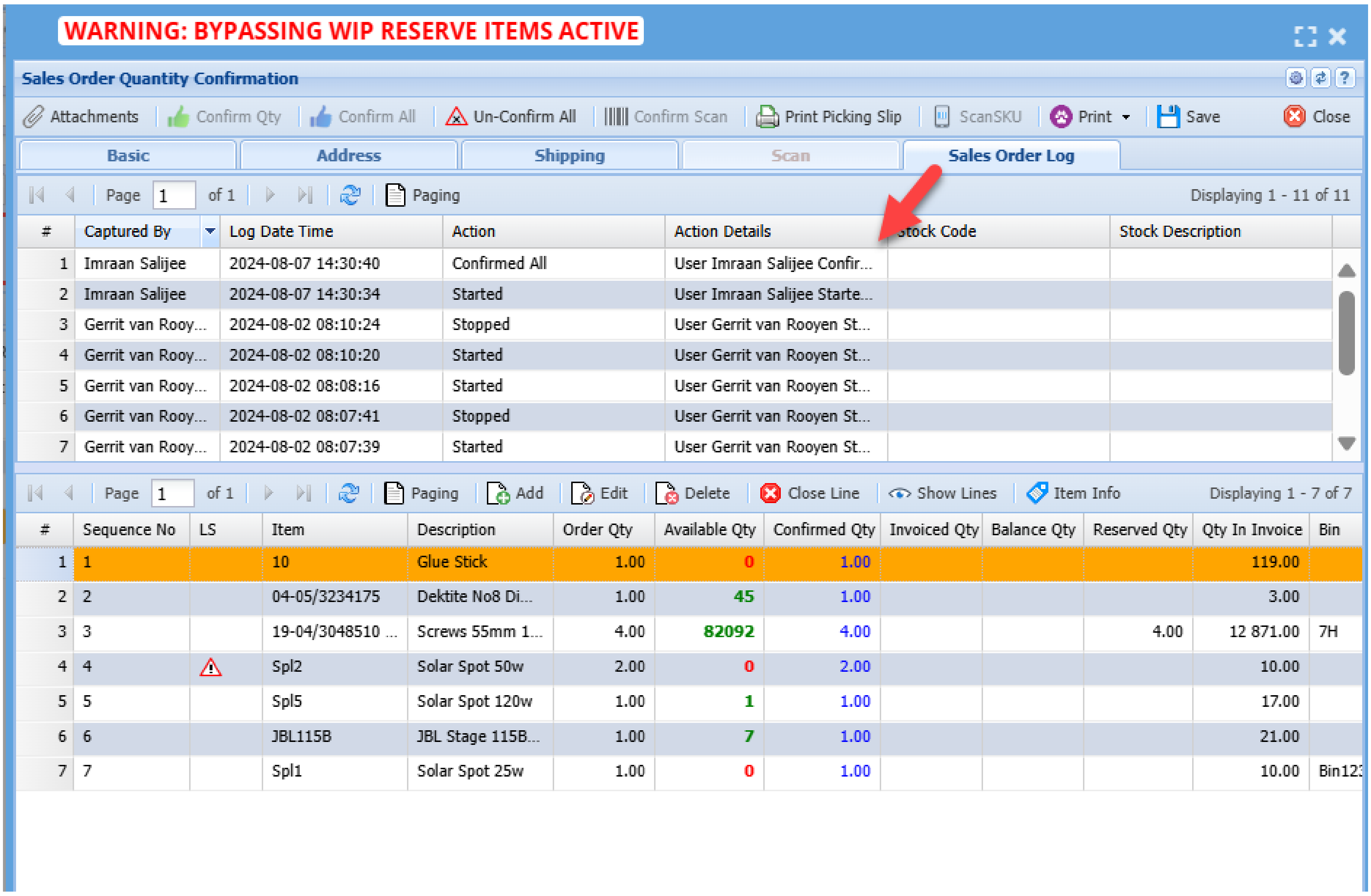


Sales Order Log

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



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