

# Add Sales Order

## Detail Tab

**Debtors Module> Activity> Sales Order**

The Sales Orders screen will open

To search for existing Sales Orders, select your search criteria and click search

Search criteria can be sales order description, order number, customer name, etc

Select a date range

To create a new Sales Order, Click the Add Button as shown below

The screenshot shows a software interface for adding a sales order. The top bar contains navigation links: Attachments, Memo, Create Reminder, Functions, Send Email Confirm, Order History, and Import. Below this is the 'Sales Order' tab, which is active. The form is divided into several sections: 'Detail', 'Address', 'Extras', 'Link', 'Shipping', 'Docs', and 'Custom Fields'. The 'Detail' section contains fields for Sales Order No., Customer (with a search icon), Customer Name, Sales Rep., Sales Order Date (2024-07-02), Due Date (2024-07-09), Debtor Status, Sales Order Status, Description, Reference, Order Number, Currency View (Document Currency), Exchange Rate, and Comment. To the right of the form is a vertical toolbar with buttons: Save, Close, Print SO, Authorize SO, Confirm SO, Process SO, T & Cs, View Quote, and Revert SO. Below the form is the 'Items' section, which has a toolbar with icons for Page, Paging, Add, Note, Edit, Delete, Quick, Barcode, Show/Hide, and No data to display. The 'Items' table has columns: #, Line Reference, Seq. No., LS, Status, Type, Code, Description, Warehouse, Order Qty, Reserved Qty, and Confirmed Qty.

After clicking Add the screen below will appear



Attachments

Memo

Create Reminder

Functions

Send Email Confirm

Order History

Import

Sales Order

Save

Close

Print SO

Authorize SO

Confirm SO

Process SO

T & Cs

View Quote

Revert SO

Detail

Address

Extras

Link

Shipping

Docs

Custom Fields

Sales Order No.:

SO10798

Sales Order Status:

Preparation

Customer:

OTS001

Description:

Test 1

Customer Name:

Otsile

Reference:

Test 1

Sales Rep.:

Company

Order Number:

125

Sales Order Date:

2024-07-11

Currency View:

Document Currency

Due Date:

2024-08-20

20 Day Of Month 1

Exchange Rate:

1

R - Rand South Africa

Debtor Status:

Commission Complete

Comment:

Items

Page 0 of 0

Paging

Add

Note

Edit

Delete

Quick

Barcode

Show/Hide

No data to dis

| # | Line Reference | Seq. No. | LS | Status | Type | Code | Description | Warehouse | Order Qty | Reserved Qty | Confirmed Qty |
|---|----------------|----------|----|--------|------|------|-------------|-----------|-----------|--------------|---------------|
|---|----------------|----------|----|--------|------|------|-------------|-----------|-----------|--------------|---------------|

## Add Line Items

You can only add a line item after adding all the necessary information needed on the sales order details tab and all greyed out buttons have been greyed out

To add line items click on the middle Add Button shown below

Attachments

Memo

Create Reminder

Functions

Send Email Confirm

Order History

Import

Sales Order

Save

Close

Print SO

Authorize SO

Confirm SO

Process SO

T & Cs

View Quote

Revert SO

Detail

Address

Extras

Link

Shipping

Docs

Custom Fields

Sales Order No.:

SO10798

Sales Order Status:

Preparation

Customer:

OTS001

Description:

Test 1

Customer Name:

Otsile

Reference:

Test 1

Sales Rep.:

Company

Order Number:

125

Sales Order Date:

2024-07-11

Currency View:

Document Currency

Due Date:

2024-08-20

20 Day Of Month 1

Exchange Rate:

1

R - Rand South Africa

Debtor Status:

Commission Complete

Comment:

Items

Page 0 of 0

Paging

Add

Note

Edit

Delete

Quick

Barcode

Show/Hide

No data to dis

| # | Line Reference | Seq. No. | LS | Status | Type | Code | Description | Warehouse | Order Qty | Reserved Qty | Confirmed Qty |
|---|----------------|----------|----|--------|------|------|-------------|-----------|-----------|--------------|---------------|
|---|----------------|----------|----|--------|------|------|-------------|-----------|-----------|--------------|---------------|

Add Sales Order Item
QTY: 1815
✕

Sale Order Item
🔍 ?

Inventory Overview
View Image
Task link
Functions ▾
Currency: R - Rand South Africa
Points: 0
Category: Stock
✕ Close

Details
Notes
UOM
Specs
Build Kit

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

Description: Below Zero Mango 12x150ml MG

Item Group: ▾

Order Qty: 10

Confirmation Type: Confirmation

Pricing Structure: Default

Selling Ex VAT: 13.2

Selling Inc VAT: ☐ 13.2

Sub Total Selling: 132.0

VAT Value: 0.0

Total Selling: 132.0

Line Reference:  

Sequence No.: 1

Show In Print: ☒ Flag for Report: ☐ Weight Per Unit: 13.50

BOM Selection: ▾ Total Weight: 13.50

Division: ▾ Sales Rep: Company

Region: ▾ Project: ▾

Reserve Qty: 0

Warehouse: MAST - Master Warehouse

UOM Type: ▾

UOM: ▾

Line Discount: 0 Promotion: ☐

VAT Type: 07 Non VAT:0

Mark-up %: 52.42

Cost Per Unit: 8.66

Profit Cost / Unit: 4.5

Total Cost: 86.60

Lead Time: 0

Order Date: 2024-08-21 📅

Reminder Date: 2024-08-21 📅 Reminder

Required Date: 2024-08-21 📅

Supplier: MAD SOUND EQUIPMENT

Drop Ship: ☐ RFQ: ☐

PO Qty:  

Item Code:  

Item Cost: R 0.00

Item Discount: 0.00% 0.00

Last Updated: 2023-09-20 09:17:10

Last Updated By: Malcolm Granville

Internal Note:

💾 Save

Qty On Sales Orders: 45 Detail

Qty On SO Confirm / WHS: 63 Detail

💾 Save & New
💾 Save & Close
✕ Close

Update Cost
Recalculate Item

You can also search for the item by using part of the code or the name of the item

Enter the quantity or how many items you creating a sales order for

Make sure pricing is correct

Select a relevant warehouse if you have multiple warehouses

### Select the correct VAT Type

Click Save & Close if capturing numerous line items

Click Save & Close if capturing a single line item

Once done

All line items will appear on the grid below

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 SO

Process SO

T & Cs

View Quote

Revert SO

Sales Order No.: SO10798

Sales Order Status: Preparation

Customer: OTS001

Description: Test 1

Customer Name: Otsile

Reference: Test 1

Sales Rep.: Company

Order Number: 125

Sales Order Date: 2024-07-11

Currency View: Document Currency

Due Date: 2024-08-20 20 Day Of Month 1

Exchange Rate: 1 R - Rand South Africa

Debtor Status: Commission Complete

Comment:

Items

Page 1 of 1

Paging

Add

Note

Edit

Delete

Quick

Barcode

Show/Hide

Displaying 1 -

| # | Line Reference | Seq. No. | LS | Status | Type  | Code      | Description       | Warehouse        | Order Qty | Reserved Qty | Confirmed Qty |
|---|----------------|----------|----|--------|-------|-----------|-------------------|------------------|-----------|--------------|---------------|
| 1 |                | 1        |    |        | Stock | 111100060 | Below Zero Water  | Master Wareho... | 2         |              | 0             |
| 2 |                | 2        |    |        | Stock | 101142    | Below Zero Man... | Master Wareho... | 15        |              | 0             |

Footer

Promotion Value: 0.00

Clear Discount

Discount %: 0

Amt: 0.0

Service Month: July

Employee: Otsile Loate

Pricing Analysis

Margin %

Mark-up %

Cost Ex VAT

Profit

31.26

24.36

149.79

68.12

Total

Sub Total

Discount

Ex VAT

VAT

Inc VAT

217.9

0.0

217.9

0.0

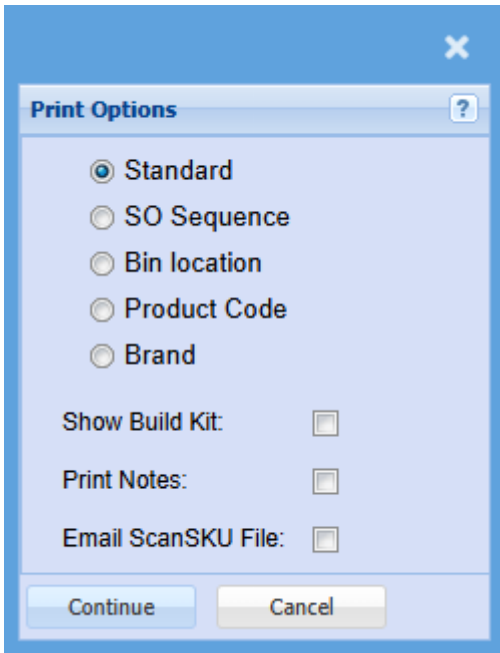
217.9

After capturing you can send it to a relevant person to authorize the SO

Once a PO is authorized you can confirm it so the warehouse staff can confirm the quantity and start picking stock

## Sales order Printing Options

After clicking confirm the printing options will pop up below:

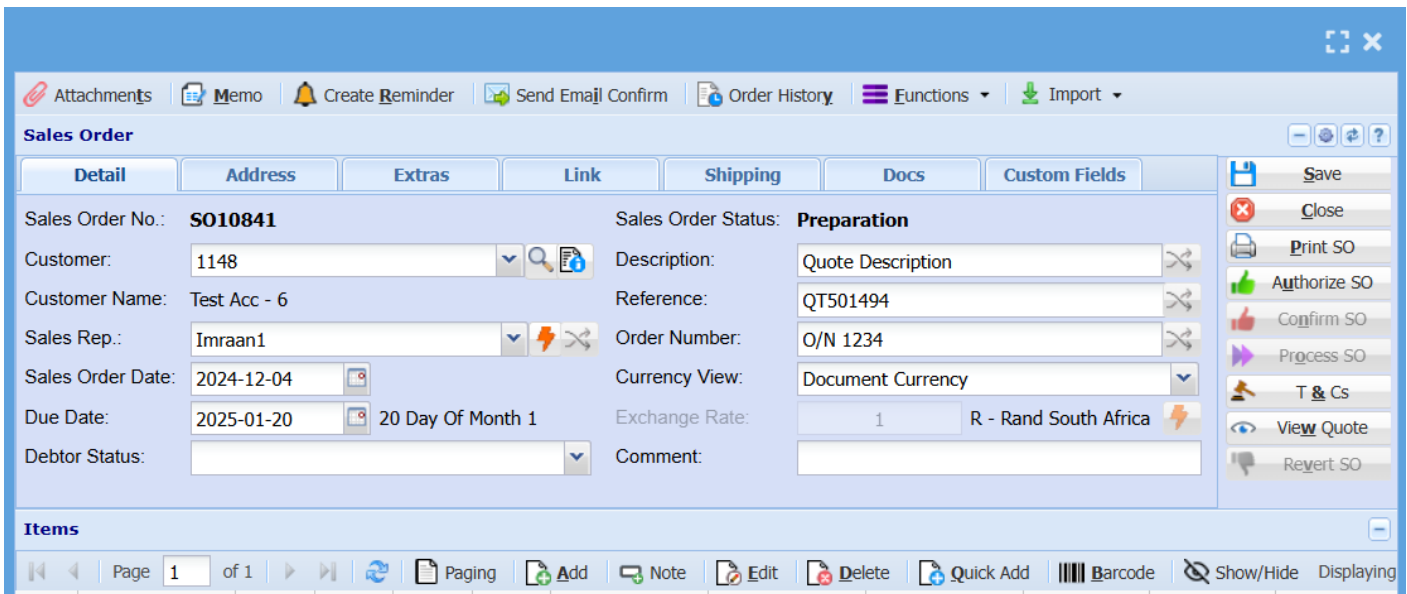


Click [here](#) to see a manual on how to confirm sales order quantity

## Keyboard quick keys for Sales Order Detail

Quick keys help access functions using the keyboard

Used with Alt + Letter



|                         |         |                                                                     |
|-------------------------|---------|---------------------------------------------------------------------|
| Attachment              | Alt + t | Opens the Attachment window                                         |
| Memo                    | Alt + m | Opens the Memo window                                               |
| Create Reminder         | Alt + r | Opens the Reminder window                                           |
| Send Email Confirmation | Alt + i | Sends an email to the contact person on Confirmation of Sales Order |
| Order History           | Alt + o | Opens the Order History window                                      |

|                        |         |                                                                                   |
|------------------------|---------|-----------------------------------------------------------------------------------|
| <b>F</b> unctions      | Alt + f | Focus on the Function split button                                                |
| <b>S</b> ave           | Alt + s | Saves the sales order                                                             |
| <b>C</b> lose          | Alt + c | Closes the sales order window                                                     |
| <b>P</b> rint SO       | Alt + p | Print the Sales Order                                                             |
| <b>A</b> uthorize SO   | Alt + u | Authorize the Sales Order                                                         |
| <b>C</b> onfirm SO     | Alt + n | Confirm the Sales Order                                                           |
| <b>P</b> rocess SO     | Alt + o | Process the Sales Order                                                           |
| <b>T &amp;</b> Cs      | Alt + & | Opens the Terms and Conditions window                                             |
| <b>V</b> iew Quote     | Alt + w | Opens the associated quote for viewing (if applicable)                            |
| <b>R</b> eververt SO   | Alt + v | Resets the Sales Order to Preparation Status                                      |
| <b>A</b> dd            | Alt + a | Opens a New Sales Order Line Detail window                                        |
| <b>E</b> dit           | Alt + e | Opens the Sales Order Line Detail window for the selected sales order line        |
| <b>D</b> elete         | Alt + d | Deletes the selected line from the sales order                                    |
| <b>Q</b> uick Add      | Alt + q | Opens the quick add window to add a sales order line to the sales order           |
| <b>B</b> arcode        | Alt + b | Opens the Barcode window to add an item using barcode scanning                    |
| Attachment Button      | Alt + 0 | Focus on the Attachment button                                                    |
| Tab Sales Order Detail | Alt + 1 | Sets the tab notebook to the Sales Order Detail tab                               |
|                        | Alt + 2 | Pressing Alt + 2 repeatedly will step through the various tabs in the tabnotebook |

## Keyboard quick keys for Sales Order Line Item Detail

Quick keys help access functions using the keyboard

Used with Alt + Letter

Edit Sales Order Item

QTY: 970

×

Sale Order Item

Inventory Overview

View Image

Task link

Functions

Currency: R - Rand South Africa

Points:

Category: Stock

Close

Details

Notes

UOM

Specs

Build Kit

Save & New

Save & Close

Close

Update Cost

Recalculate Item

|                       |         |                                                                                    |
|-----------------------|---------|------------------------------------------------------------------------------------|
| Inventory Overview    | Alt + o | Opens the Inventory Overview window                                                |
| View Image            | Alt + i | Opens the View Image window                                                        |
| Task Link             | Alt + t | Opens the Special Item window                                                      |
| Close                 | Alt + c | Closes the Sales Order window                                                      |
| Reminder              | Alt + r | Opens the Reminder window                                                          |
| Functions             | Alt + f | Focus on the Function split button                                                 |
| Save & New            | Alt + n | Saves the Sales Order Item Detail window and opens a new SO Item window            |
| Save & Close          | Alt + v | Saves the Sales Order Item Detail window and then closes the window                |
| Update Cost           | Alt + u | Updates the cost of the selected item to the latest cost price                     |
| Recalculate Item      | Alt + l | Recalculates the Sales Order Item's values Mark-Up %, Costs etc.                   |
| Inventory Overview    | Alt + 0 | Focus on the Inventory Over button                                                 |
| Tab Quote Item Detail | Alt + 1 | Sets the tab notebook to the Quote Item Detail tab                                 |
|                       | Alt + 2 | Pressing Alt + 2 repeatedly will step through the various tabs in the tab notebook |

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