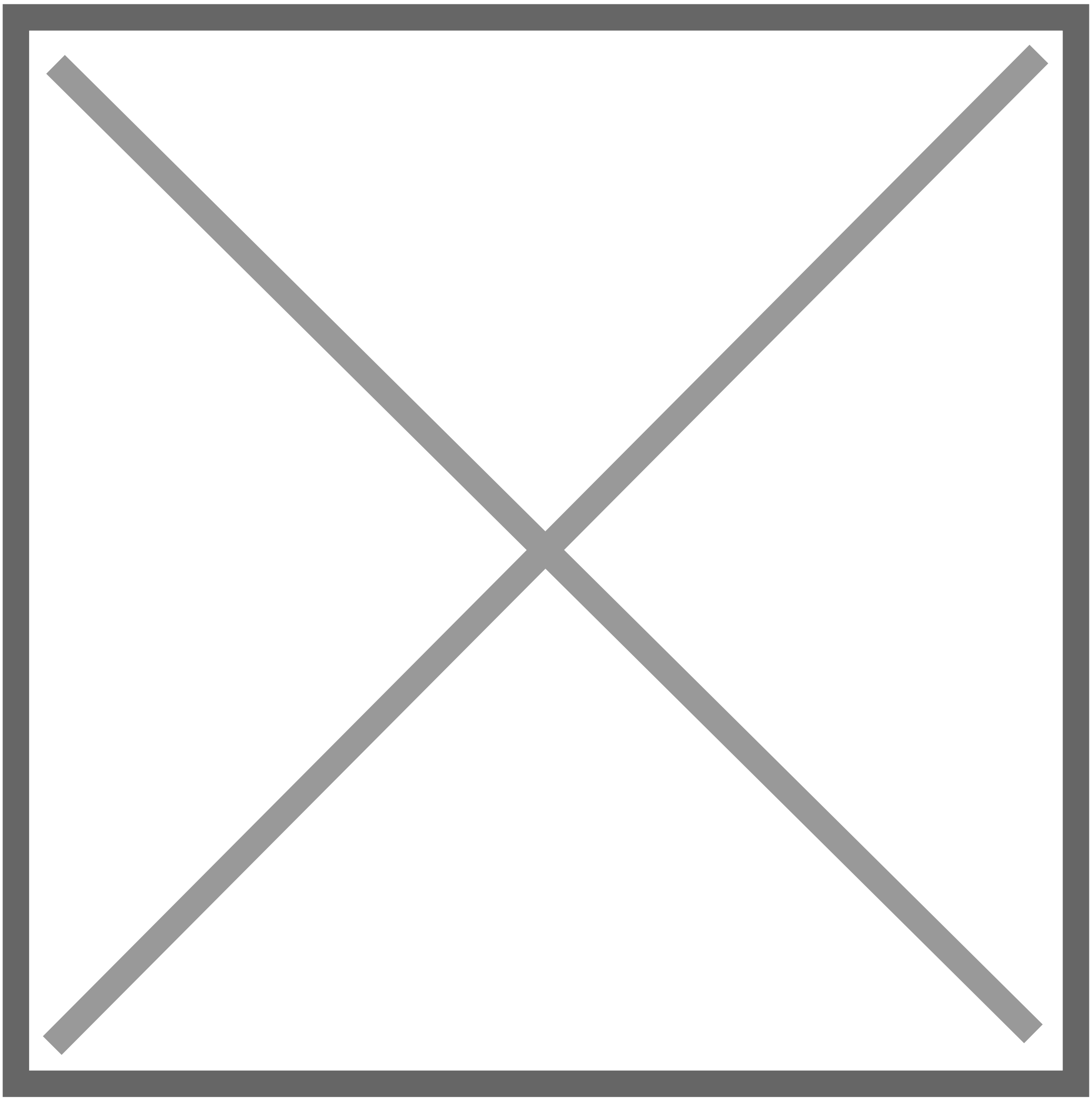
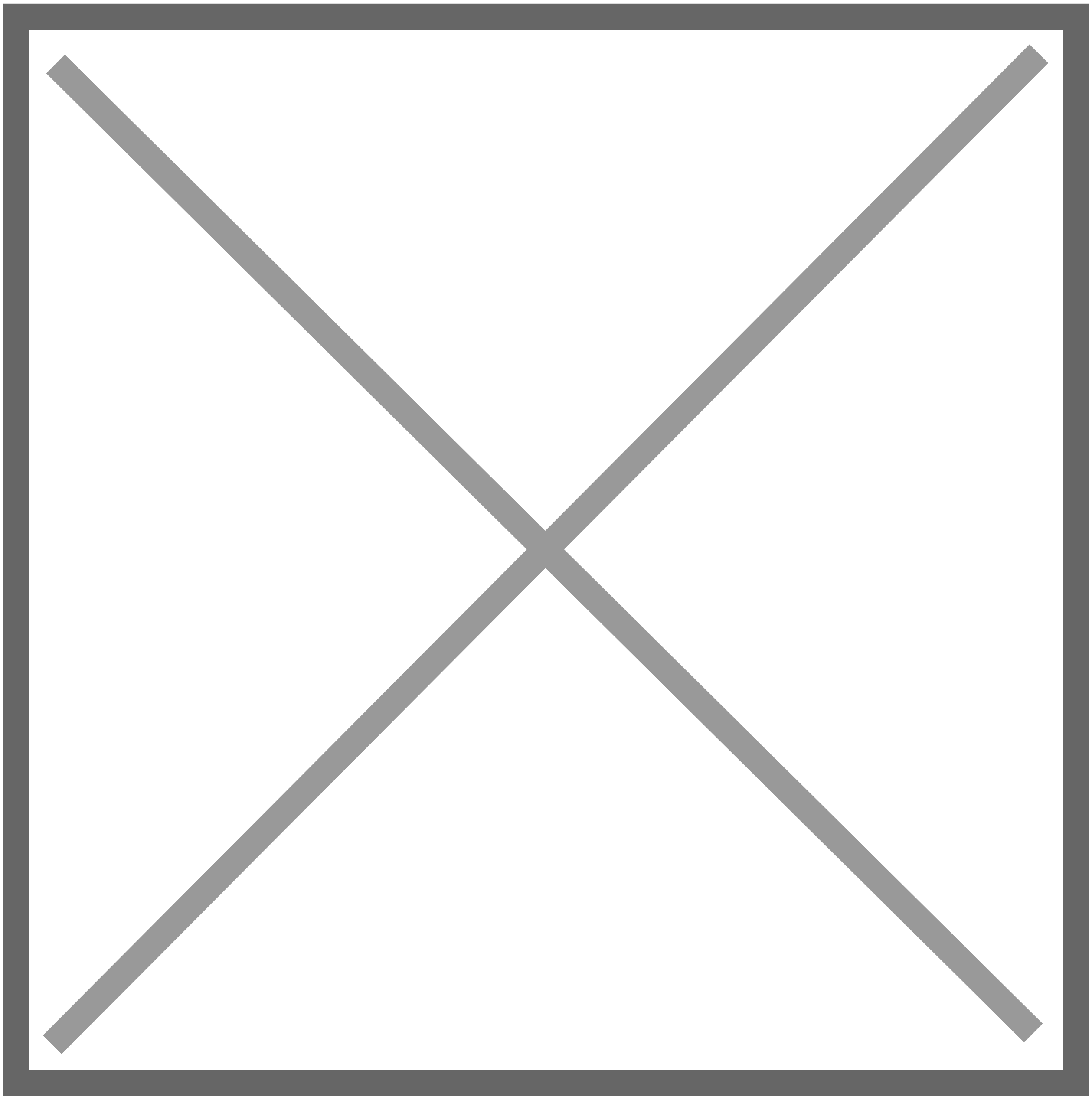
Advanced Add Sales Order

Adding a new Sales order

Click on Add button to add a new sales order



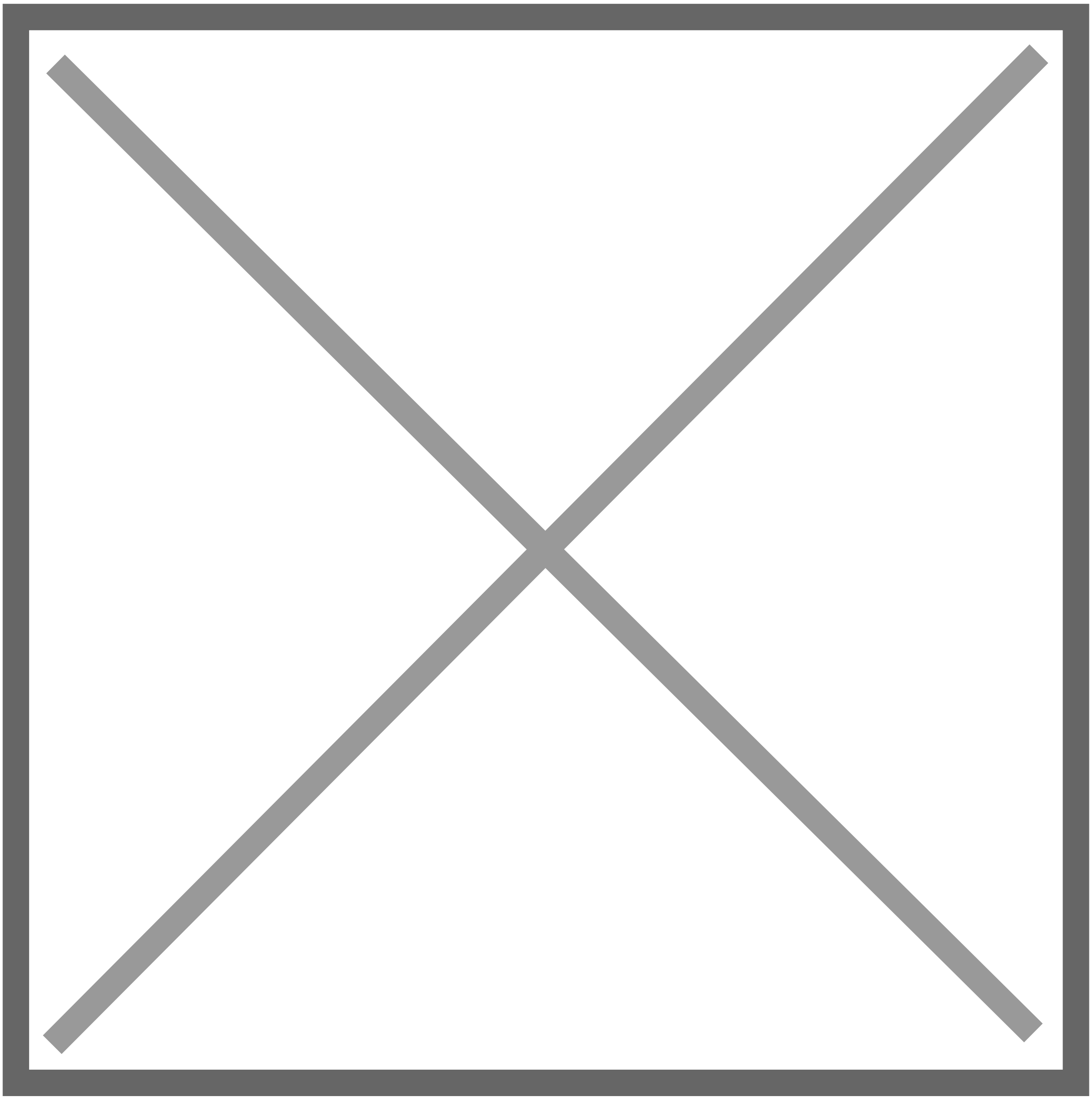
Sales order window



Sales Order

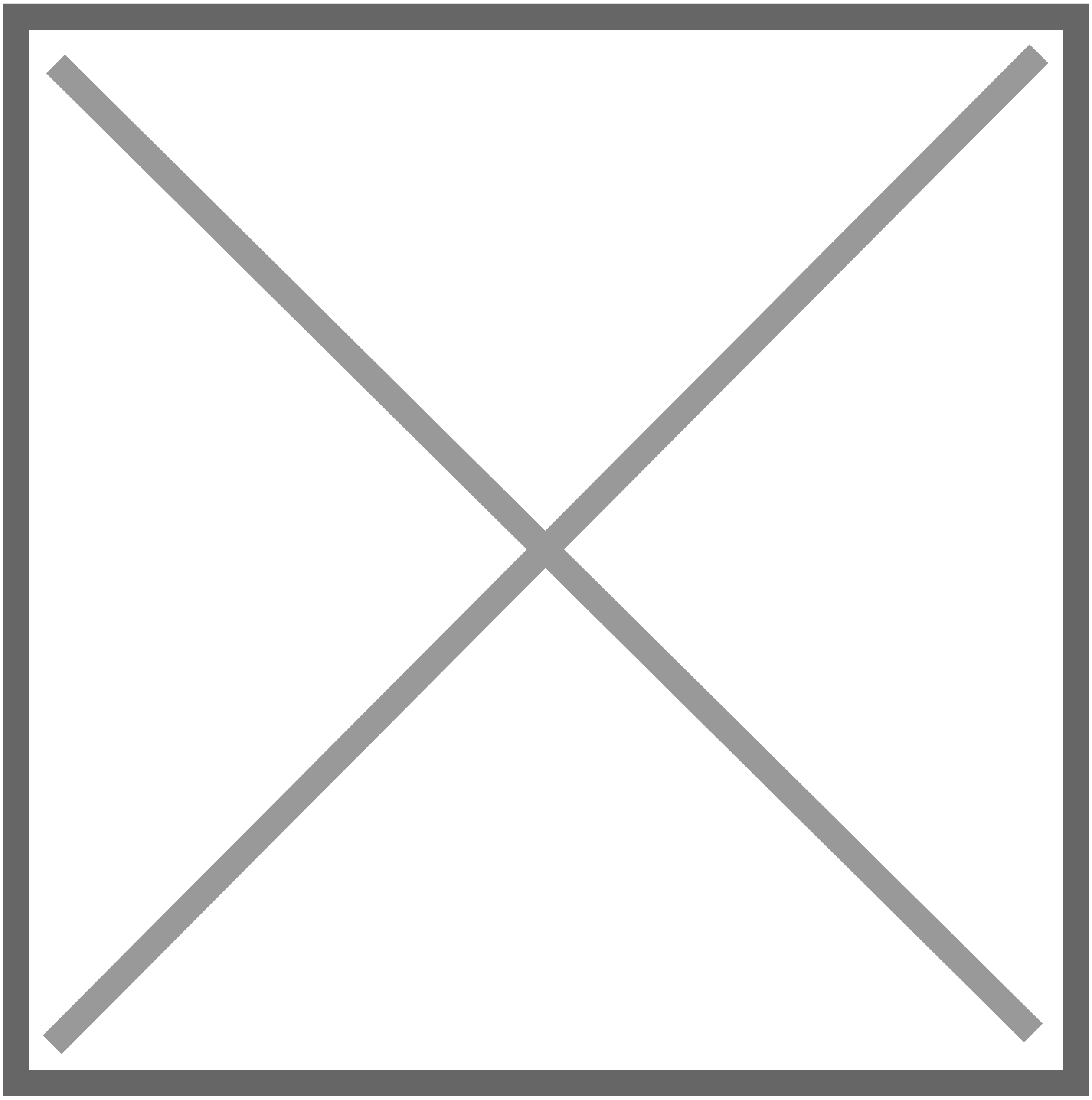
Choose The Debtor by entering a customer Code

Detail Tab

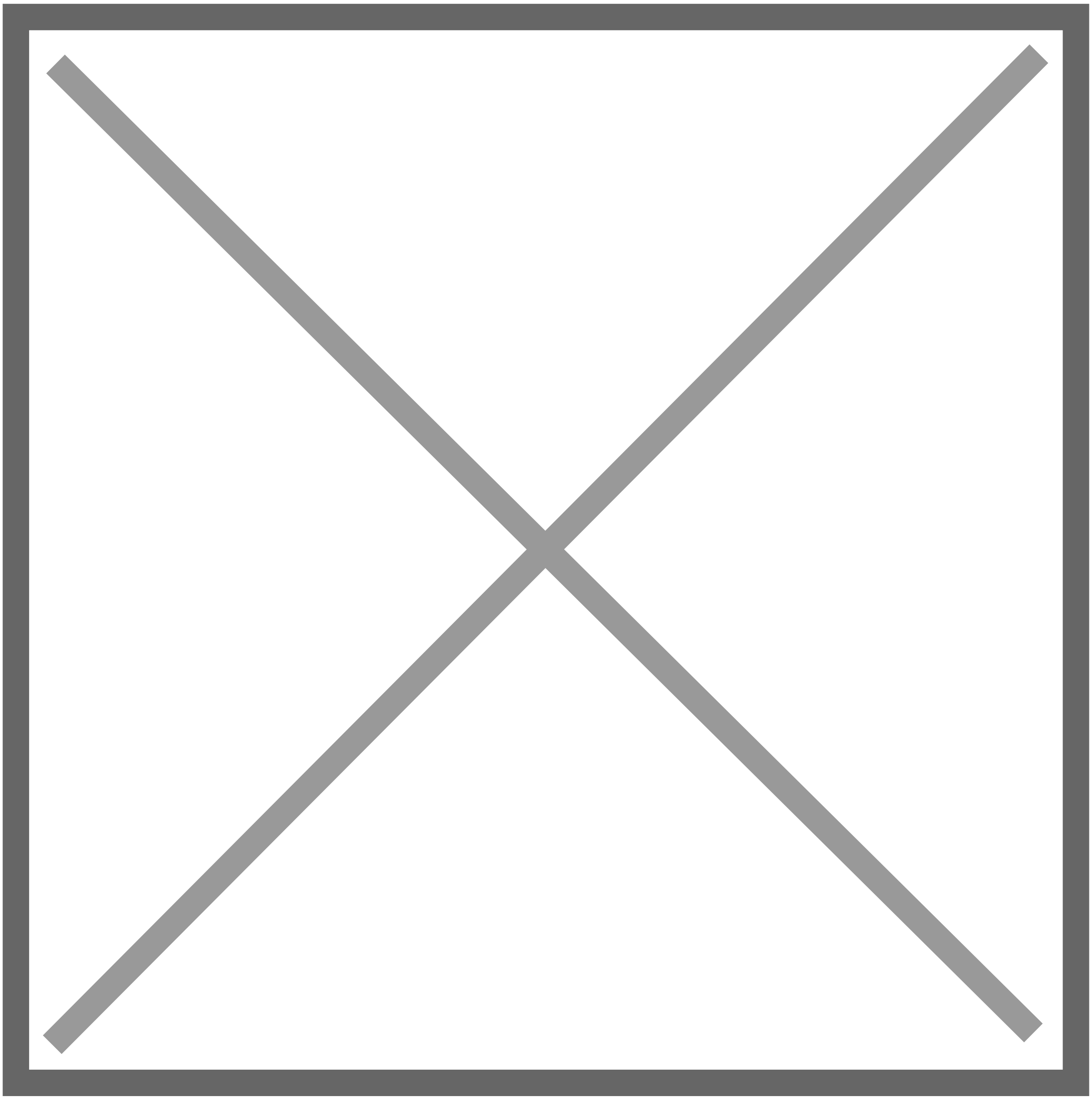


Short Details	Short Details Of the sales Order Item
Reference	Give it A Reference
Order Number	Enter an Order Number
Sales Rep	Select a Sales Rep

Address Tab



Extras Tab



Details	Add Extra Details Regarding this Sales Order
TrackIt Item	Link a trackit item to this sales Order
Job Number	Add this sales Order to A job
Print Custom fields	Add a Tick If you want the Custom Field to reflect when printing The Sales Order

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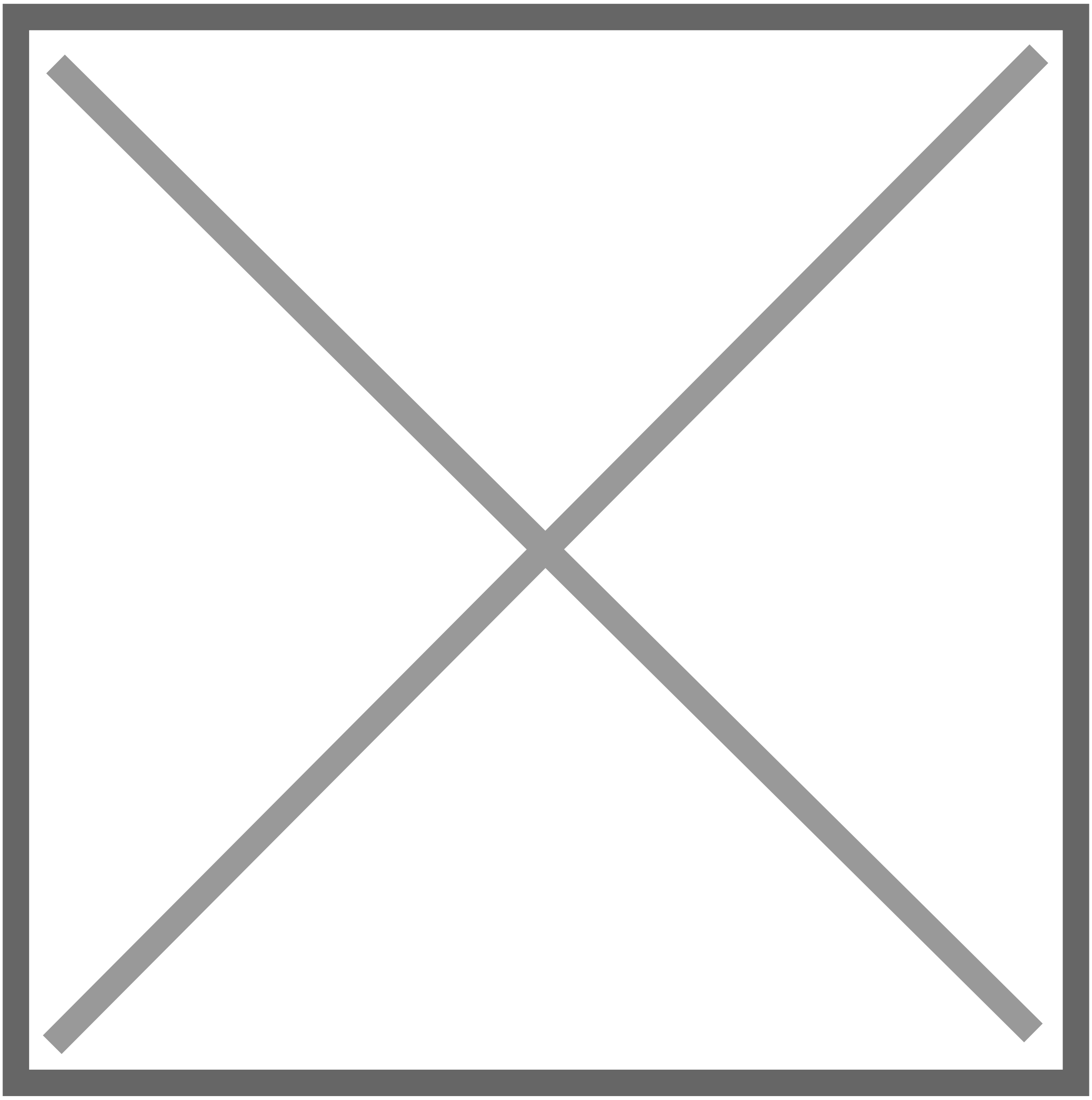
Sales Order Lines

Details tab



Category select the category from the drop down arrow

Item Code to select an item code by hitting enter or using the”? “Long search button

Item Description	comes up when the code is selected but can be edited
Order quantity	quantity of Items Needed

Reserve Quantity this is the allocated quantity Company:

Selling Including Vat

If the Selling price including vat is not ticked

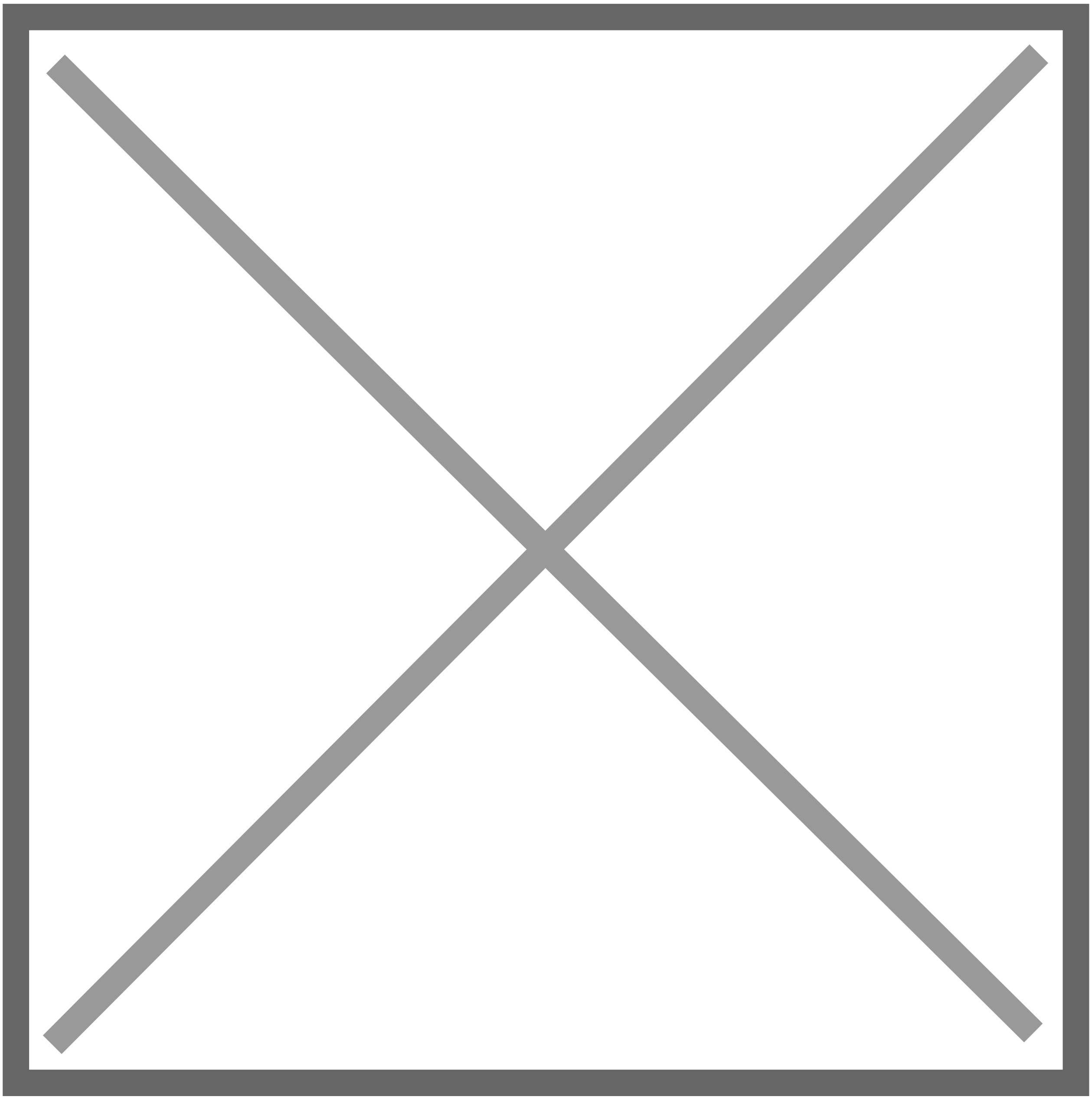
The Selling Including Vat will Be Greyed Out Company:

Authorise Sales Order

Changes The Sales order Status to Authorized

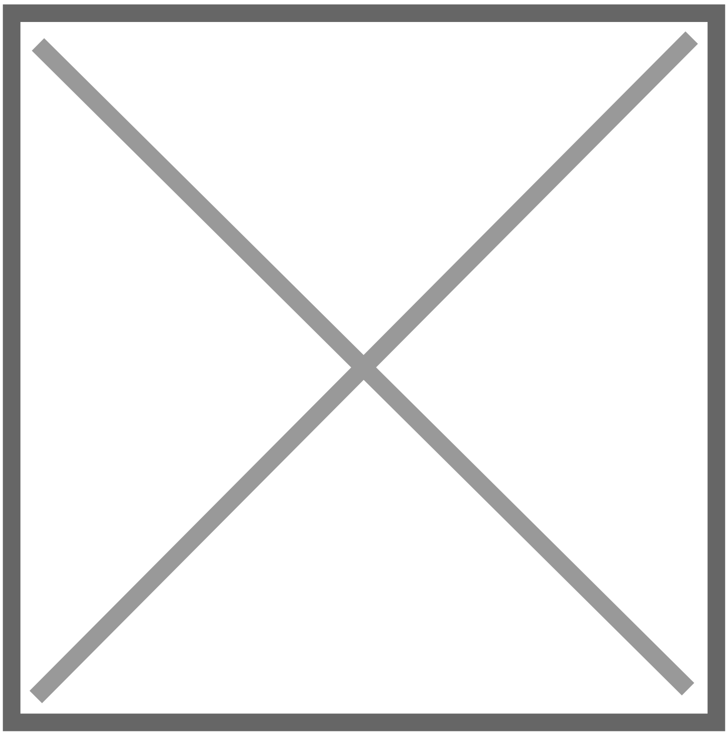
Unauthorize Sales Order

Reverts the Authorized Sales order back to preparation Stage



Change Warehouse

The change warehouse allows the user to change the warehouse selected on the items lines to another warehouse that has the stock available.



Commission line item percentage update

Commission line item percentage will be updated to documents at the time it adds the line.

There is a new field on each document line to handle the line percentage.

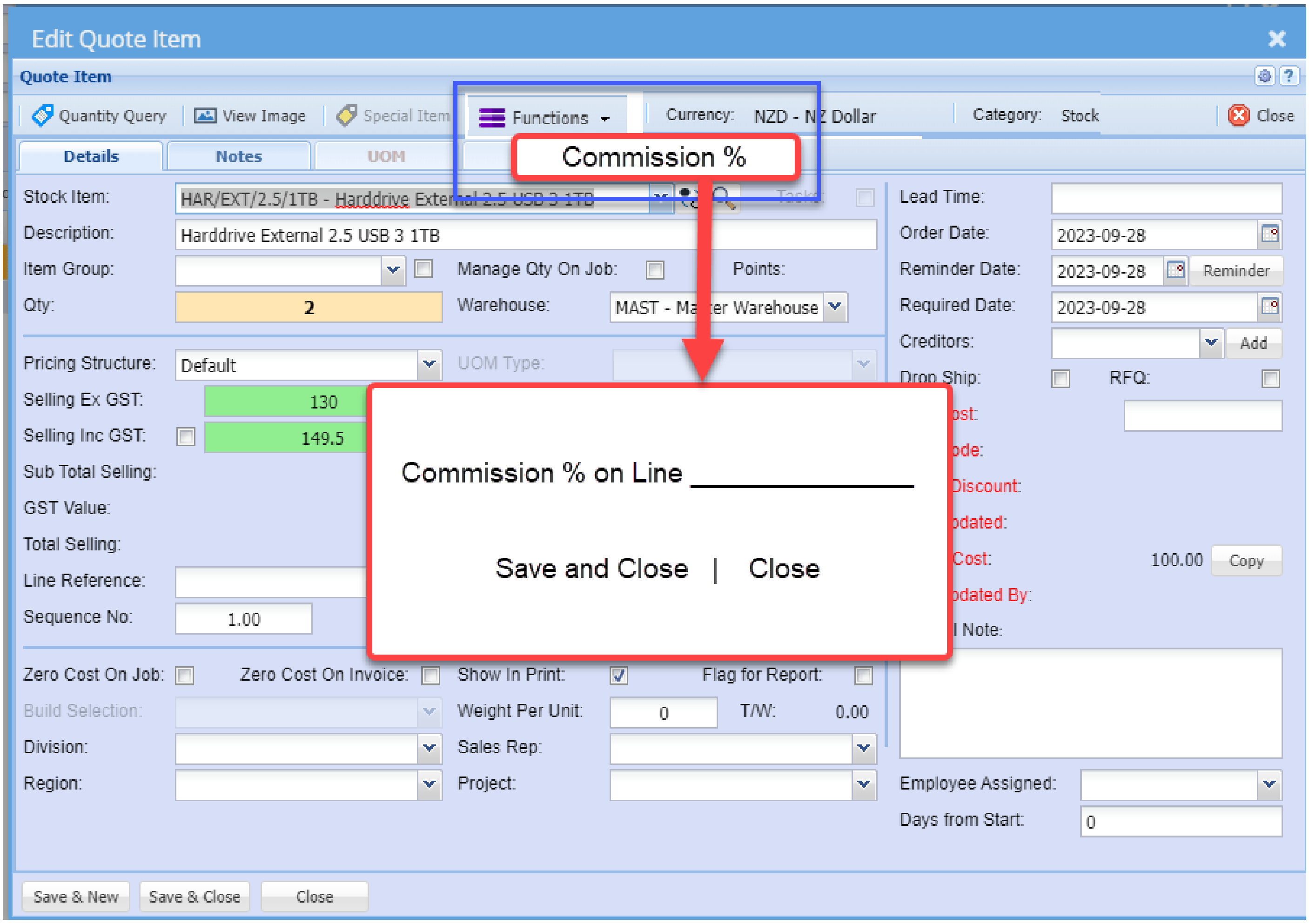
All documents to contain this line percentage

1. Quote
2. Sales Order
3. Invoice
4. Credit Note

When promoting the document, the original percentage will be copied between the documents.

When the Sales order is promoted from Sales order to commercial invoice, the percentage will be worked out on the percentage saved on the line.

> If the commission line is blank, then the commission % will be gotten from the item line

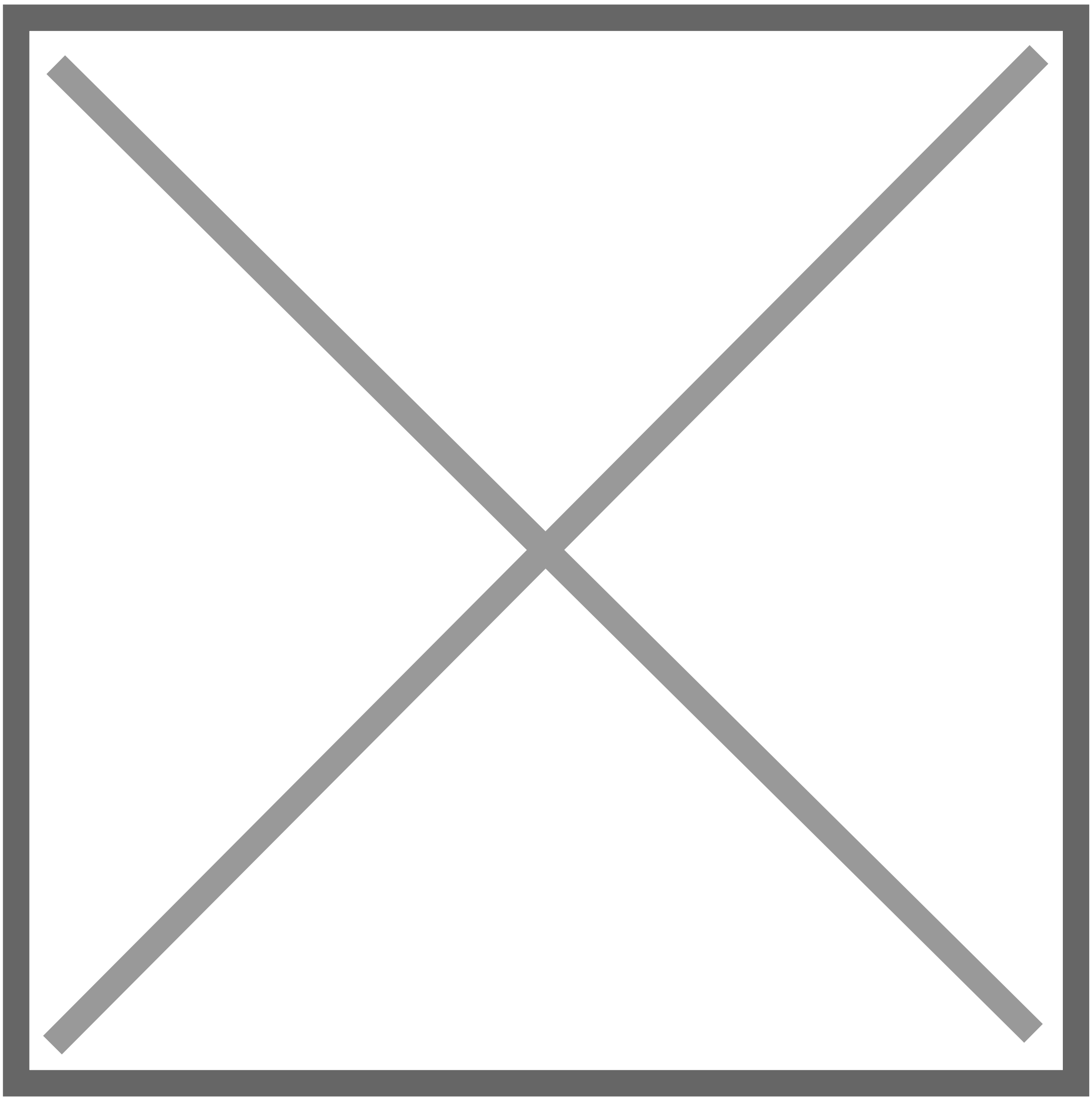


Import sales order items

Debtors>Activity> Sales Order> Import Items

Importing items in the system is the quickest way to bring in large data at once and this can be done for a sales order items

1. Click on Import items
2. Select your file to upload
3. Import
4. and close.



The file to be imported must be in a CSV format.

Click on the Select Files… button to open the navigate window allowing the user to navigate to the file to be imported.

Once the desired file has been located either double click on the file or click the Open button.

Now click on the Upload button. If the upload was successful a window will appear confirming that the upload was successful. Click Ok.

The Import button now becomes enabled allowing the user to click on the Import button to import the file.

An Import Report will open displaying any errors in the import or displaying the successful sales order items import.

> Please Note: All successful records will be imported, and errors will be skipped. The column headings can be left in the import file providing that the heading is as per the sample below.

Confirmation Type

The 3 types to be used are:

Confirmation
Invoice
Invoice & Process

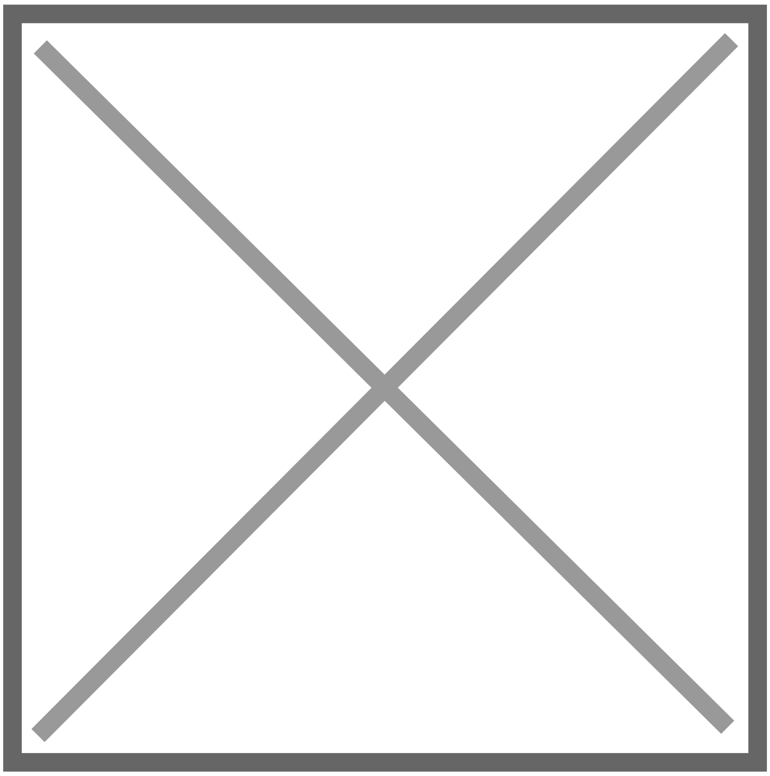
Import File Layout

No.	Heading	Value
1	ItemCode	PEN001
2	Description	Red Pen
3	OrderQTY	2
4	ReserveQty	0
5	ConfirmationType	Confirmation
6	SellingExVAT	100
7	CostExVAT	75
8	Warehouse	Master
9	LineDiscount	
10	LineRef	
11	Notes	
12	ItemGroup	
13	Points	15

Buttons Defined

Create Stock Request

Debtors>Activity> Edit Sales Order



Storeman > Select your name from the Drop down List

Add date required by

And Click Continue

The three options in the dropdown,

Request for Purchase Order

Request for Quote

Request Create Job Picking Slip

are simply a suggestion from the Stock Request originator to the recipient of what action must be taken when processing the Stock Request.

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