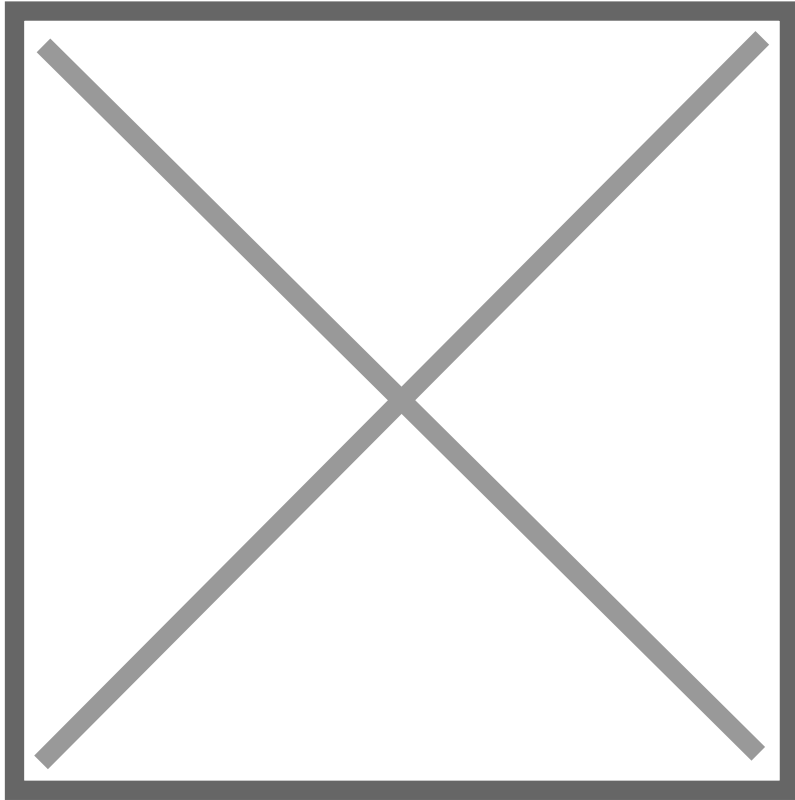


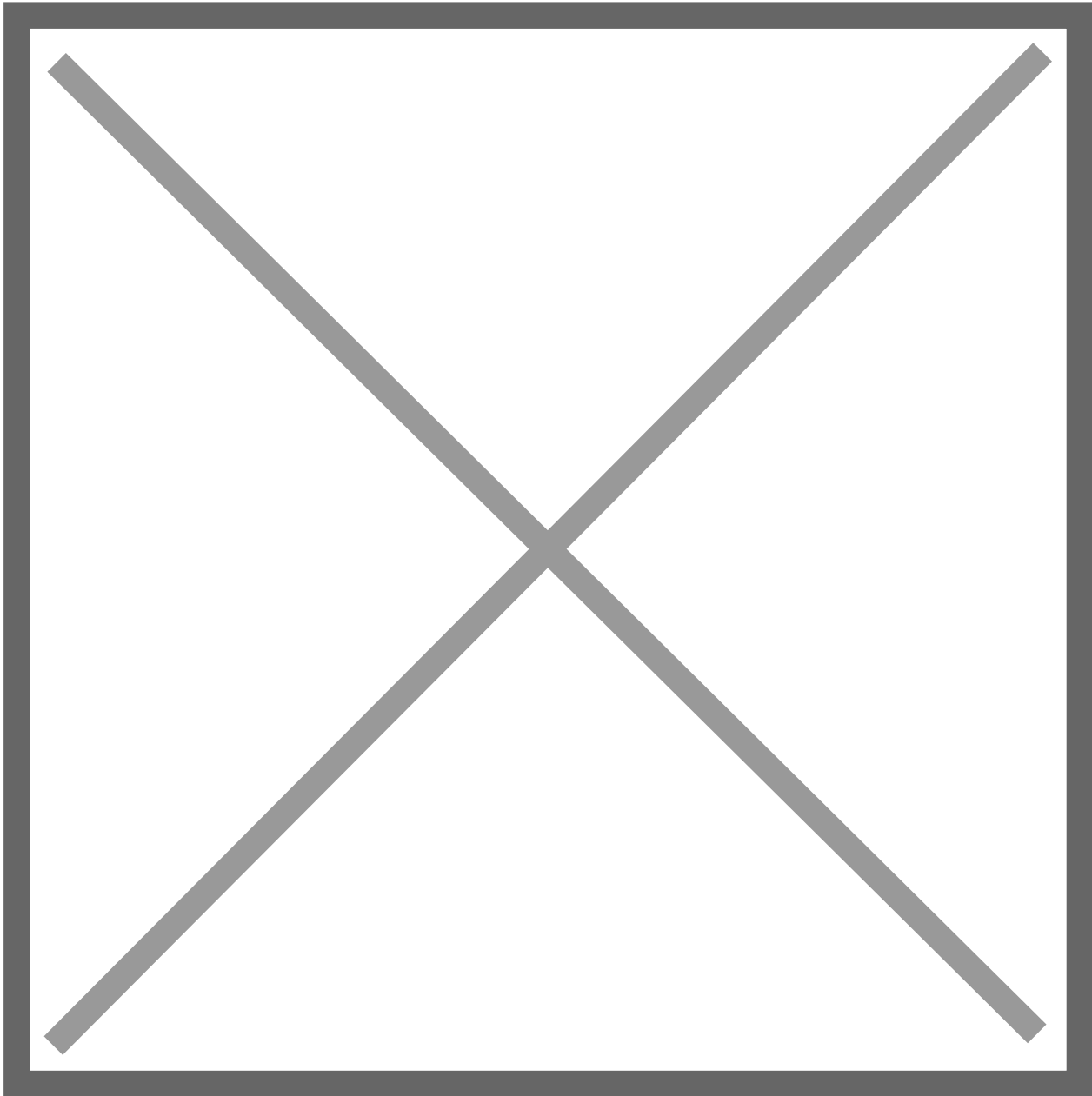
Sales Order Search

Debtors Module> Activity> Sales Order

Video training manual 2016 - [Click Here](#)



Sales Order processing occurs after receipt of a sales order from a customer.



Buttons defined

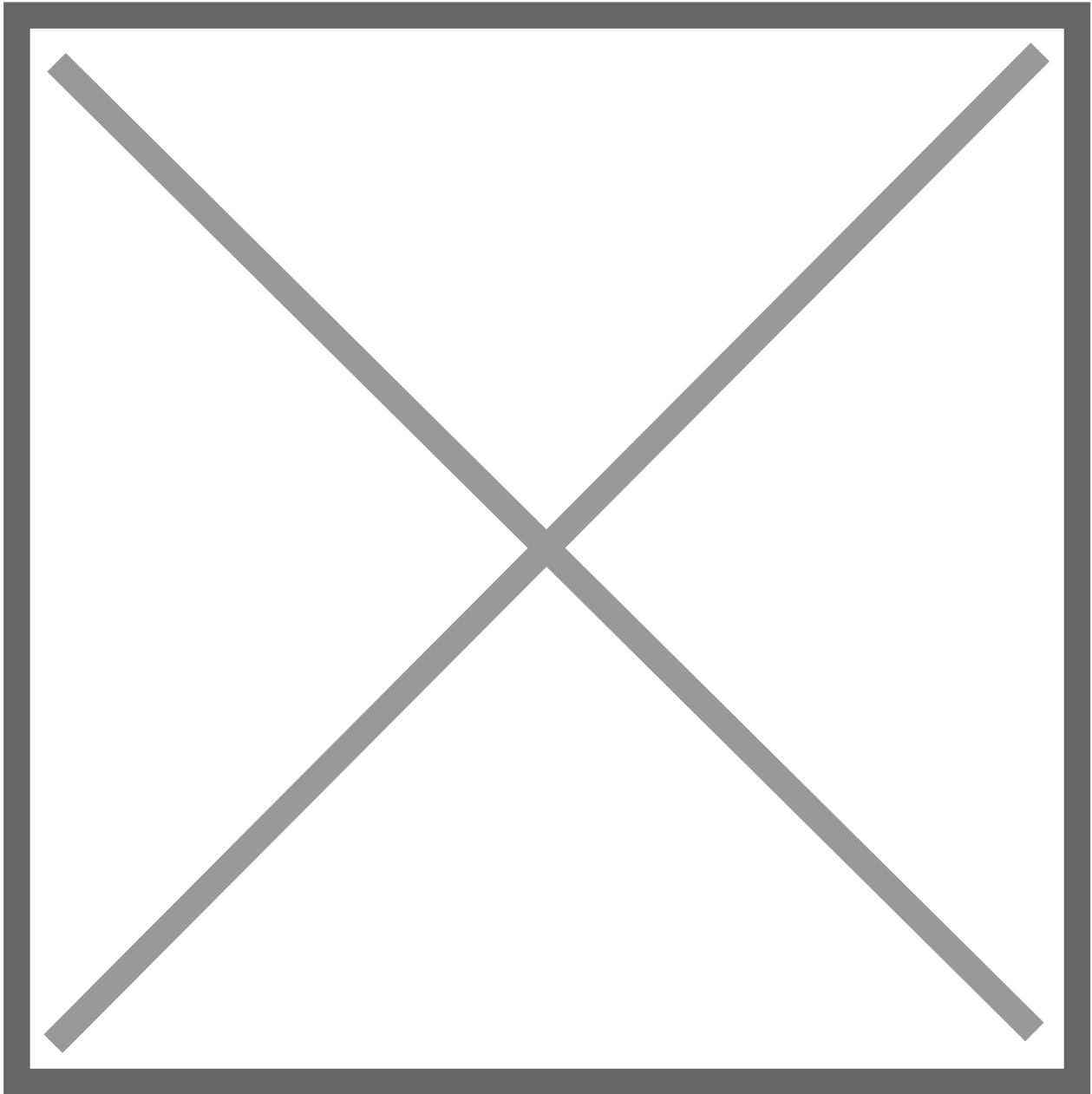
Search	Search for an existing sales Order
Add	Add a new Sales Order
Edit	edit an existing sale Order
Cancel	Cancel a sales order
Close	Close a sales Order
Create reminder	Create a reminder for the sales order
Create Stock request	create a stock request
Actions	This button opens up action items that can authorize, unauthorize, confirm, confirm quantity, process a sales order

Print/Export	print sales order - or export sales order details to excel.
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Search options

Customer Name	Allows a user to search by customer and the system will pull only the sales order for that selected customer
Date From	Select the date from which the sales order will be functional from
Sales Order Number	Search by selecting the sales order number
Sales Rep	Search by selecting the sales Rep from the drop-Down Menu
Date to	Search by selecting the date to

Custom Fields Tab



Contract / Expand Tab

Search by Selecting from the category from the drop down arrow



Sales Order

Search

Add

Edit

Clone

Create Reminder

Create Stock Request

Close / Cancel

Approvals

Process

Print / Export

Basic Search

Custom Search

Expand

Sales Order No.:

Customer:

L:

Sales Order Status:

Preparation And Authorized

Description:

Reference:

Date From:

2024-09-30

Date To:

2024-10-30

Total Ex VAT:

757.00

Total VAT:

113.55

Total Inc VAT:

870.55

Page 1 of 1

Remove Paging:

Revert SO

Import Document

Quote Number	#	Att	Memo	Ship	%	Progress	Sales Order No.	On Hold	Date	Due Date	Shippi
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Sales Order

Search Add Edit Clone Create Reminder Create Stock Request Close / Cancel Approvals Process

Basic Search Custom Search Expand

Sales Order No.:

Customer: L: ☐ Sales Order Status:

Description: Reference:

Date From: Date To:

Total Ex VAT: 757.00 Total VAT: 113.55 Total: 870.55

Approvals

- Authorize
- Unauthorize
- Confirm
- Confirm Qty
- Import Back Orders
- Partial Complete

Import Back Orders

Import Back Orders

Import Back Orders and Close SO Close

Customer: IMRAAN NEW Doc No: SO10835

Code: 1172 Date: 2024-10-30

Description: test stationery Reference:

Page 1 of 1 Displaying 1 - 1 of 1

#	Doc No	Date	Customer	Description	Reference	Order No	Qty B/O
1	SO10806	2024-07-29	IMRAAN NEW	test pick slip or...			7

Import / Export

Sales Order

Search Add Edit Clone Create Reminder Create Stock Request Close / Cancel Approvals Process Print / Export Import / Export

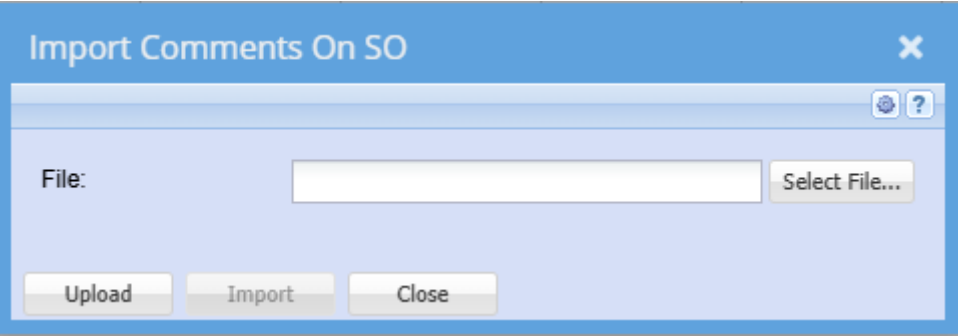
Basic Search Custom Search Expand

Sales Order No.:

Customer: Sales Order Status:

Import / Export

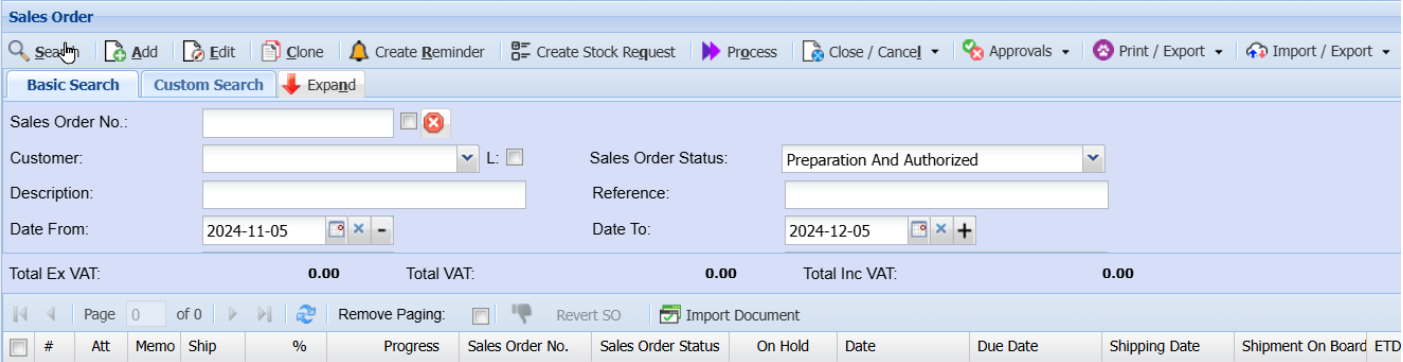
- Import Comments On SO



Keyboard quick keys

Quick keys help access functions using the keyboard

Used with Alt + Letter



Search	Alt + s	Search for Quotes
Add	Alt + a	Add a new Quote
Edit	Alt + e	Edits the Quote that is highlighted
Clone	Alt + c	Clone the highlighted Quote
Create Reminder	Alt + r	Creates a reminder to highlighted Quote
Create Stock Request	Alt + q	Opens the dialog window for Stock Request
Process	Alt + o	Process Sales Order
Print Sales Order	Alt + p	Print Sales Order
Expand / Contract	Alt + n	Expands / Contracts the header section of the window
Close / Cancel	Alt + l	Focus on the Close / Cancel split button
Tab Basic Search	Alt + 1	Basic Search
Tab Custom Search	Alt + 2	Custom Search

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