

# Create a Sales Order

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## Overview

A **sales order** is an order issued by a business or sole trader to a customer. A sales order may be for products and/or services. The **Sales Order** is a confirmation document sent to the customers before delivering the goods or services. **Sales Order** (SO) can be created once the quote is accepted by your prospective customer (potential) and the Purchase **Order** (PO) is sent by the customer for further processing.

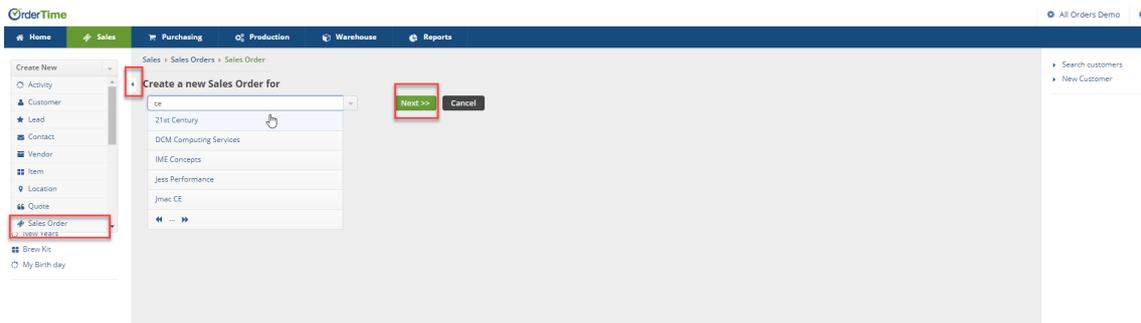
A sales order can be originated in various ways:

- A lead can be turned into a potential Sales Order and generated in the system.
- A Sales Order can be generated from a Quote. A Quote is accepted by the customer then it is converted through the system into a Sales Order.
- A Sales Order can be generated directly when a customer is entered into the system. When a call is received by a customer who wishes to purchase your product, then a Sales Order is generated to complete your customer's order.

## Generating a Sales Order

To generate a new Sales Order:

1. Open the side menu and click on **Create New** drop-down menu.
2. Select **Sales Order**.
3. Enter your customer's name on the Create a New Sales Order box. A drop-down menu will provide you with a list of customers that are already in your database. Select the appropriate customer.
4. Click on **Next>>** to proceed to the next screen.



## Review Customer Information

On the Customer Information Screen review customer's Billing Address and Shipping Address. If they are different, make changes as needed to insure the Sales Order has the correct billing address and shipping address.

1. Select the **Date** if it is different from the day of origination. (Date is auto-filled)
2. On the **Promised Date** box, click on the calendar and select the desired date.
3. Enter **Customer's Purchase Order** (PO) number if a PO was received from your customer.
4. If there are changes to the customer's billing address, you have the option to **copy changes to the Customer**. This function will transfer all the updates made to the customer's database.
5. In the **Shipping Address**, you can enter a different address from the billing address.
6. Provide more details by completing the other tabs: Default, Memo & Instructions and Custom.

If the Billing Address will be used for shipping, copy the Billing Address by clicking on the "copy billing address" next to the Shipping Address header. If you desired to copy these changes to the customer's database, select on the "Copy changes to customer" at the bottom of the shipping address section.

OrderTime All Orders Demo

Home Sales Purchasing Production Warehouse Reports

Sales > Sales Orders > Sales Order

Create New Open Full List

Recent Records

Customer: 21st Century

No. 3954 Date 8/7/2017 Promise Date 8/7/2017 Customer PO 2511554

Address Defaults Memo & Instructions Custom

Billing Address

Name/Company Farmers

Street 4720 N 36 Ct

Floor/Suite

Care of

City Columbia

State/Prov./Reg. MD

Zip/Postal code 21045

Country

Contact

Alt. Contact

Phone (443)367-5500

Alt. Phone (443)367-5500

Fax

Website

Email thisemail@email.com

Copy changes to customer

Shipping Address copy billing address

Ship To Default

Name/Company Farmers

Street 4720 N 36 Ct

Floor/Suite

Care of

City Columbia

State/Prov./Reg. MD

Zip/Postal code 21045

Country

Contact

Alt. Contact

Phone (443)367-5500

Alt. Phone (443)367-5500

Fax

Website

Email test@email.com

Copy changes to customer

- **Default Tab**

Under the Default tab, you will have the option to select the Location, Contact, Payment Terms, Sales Rep, Class, FOB, Partial shipping (Select if Allow to Ship Partial), Currency and Exchange Rate.

Address Defaults Memo & Instructions Custom

Location HQ

Contact

Terms Due on receipt

Sales Rep Cid and Son Garden Nursery

Class

FOB

Allow Ship Partial

Currency

Exchange Rate 1

- **Memo & Instructions Tab**

Type information that are relevant to the Sales Order and special instructions. This information will be displayed on the Sales Order or set as an internal memo. Shipping instructions can be entered for

Shipping Instructions. Instruction can also be used as a way filtering your Sales Orders.

- **Custom**

The customs tab is used to customize your Sales Order. With customization, you have the option to include shipping information send a copy of the Sales Order to the warehouse, Order Status, Order Type (i.e. Sales, Repair), Instructions to warehouse or shop, estimated time of arrival, etc. (To customize your quote Customs tab, log in as the administrator and click on the Gear icon on the top right hand corner of the screen. Under Settings. click on Custom Fields.)

7. Click on **Save** to proceed to the Sales Order Screen.

## **Add your Item to the Sales Order**

The Sales Order Screen displays the customer information, billing and shipping address and a total of your items.

Name/Number drop down menu provides you with a catalog of items (catalog will be determined with your initial set up). Under the Items tab, you can enter the item number, name, UPC, Manufacturer Part No, Vendor Part No., or Customer Part No.

- Items: Enter the item and the system will provide you with a drop-down menu of similar items related to your selection. Select the required item.
  1. The system will require Quantity, Price and Price Level (e.g. Quantity 1, Price 12.00, Standard Price).
  2. On the Price Level drop-down menu, you will be able to select your pricing strategy for that item.
  3. Click on **Save** when complete. The item will be listed below with a line Item number, Item, Description, Quantity, UOM, Price, Ext, Tax Code, Cleared and Actions.

To view inventory levels for your Item, hover your mouse over the item. A pop-up screen will display the availability and image.

You can directly change the field values by clicking on the line item (item row). Field production boxes will appear, and you can add details or edit the information accordingly.

- Once the items are entered in the Sales Order, you can edit the line item number if needed.
  - To modify information on a line item, click on the notepad icon under the Action column. (You must have a Sales Order's edit capability permission to make changes to a Sales Order).
  - The General tab will display with the description of the item, quantity, price, price level, tax code. You will be able to make the necessary changes.
  - The Custom tab provides the opportunity to make changes to the production flow. This is used for items that need fabrication, work status and shop instructions. You can also specify if the item has an expiration date, serial number, measurement, and quantity produced.
  - Change the promised dates if needed. Click on **Add** when completed.
  - Click on **Save** when you have completed your changes.

- Details: This tab shows information that you provided in the Default tab when you were setting up a new Sales Order.

- Memo & Instructions: This tab allows you to modify your Memo, Shipping Instructions and Internal Notes by clicking the **Edit** button. Click **Save** when you are done.

- Custom: This tab contains the customization you have set when you were generating the Sales Order.
- Payment: Enter the payment details, including the method and amount.

By default, the Payment tab is not visible in Sales Order. In order for the Payment tab to be available, the value of the **Payment Type in Terms** should not be Accounts Receivable (No Cash Payments). Proceed to editing the Sales Order to specify the value for Terms through the Defaults tab. After doing so, the Payment tab will be available.

1. Select the **Payment** tab and click on the **+Add** icon.
2. Select from the drop down menu the preferred method of payment for your Sales Order. Depending on the selected payment method, the fields will change and prompt you to enter the appropriate details.
3. Click **Save**.

- Ship Docs: Refer to [Ship Docs](#) article for more details.
- Dependency: Under the dependency tab, you can view if the PO is tied to Sales Orders. Refer to [Special Orders](#) and [Purchase Orders](#) for more details.
- Attachments: Attachments serve as supplemental information associated with your item. This tab allows you to upload an attachment file from your local drive and/or add your website or any web source link that will lead to the image by clicking the **+Add** button. Click **Save** when you are done.
- Open Activities: An event or task can be added to your Sales Order.
  1. Select the **Open Activity** tab and click on the **Add Event** or **Add Task** buttons.
  2. Add an event by entering your information.
  3. Click **Save**. The event will display in your Home page under the activity schedule or open tasks.
- Activity History: The Activity History tab can be a helpful communication tool for your business and vendor.
  - Under the **Activity History** tab you can send an email to your employees or vendor by clicking the **+Send Email** button; and conversations can be recorded for tracking purposes by clicking the **+Add Log** button.

## Changing the Sales Order Status

Once all the necessary information has been entered into your Sales Order, you are ready to proceed to change the status of the Sales Order. On the top right side of the screen next to **Status**, use the drop down menu to change the status of your Sales Order. The following status options will be available for your Sales Order:

- **Processing:** Sales Order processing means you are in the process of recording Sales Inquiries. Generating those inquiries into “firm orders” will require the completion of necessary documents to permit customer orders to be fulfilled and invoiced.
- **Waiting:** Sales Order is in waiting for further information for final resolution.
- **Credit Hold:** Sales Order will be on hold until the merchant clears the transaction.
- **Payment Pending:** Sales Order is on hold until payment has been

received.

- **Approved:** Sales Order has been approved and the Ship Doc will be created.
- **Voided:** Sales Order has been voided by either the merchant or the customer.
- **Closed:** Sales Order is closed.

The screenshot shows the OrderTime interface for a Sales Order. The status dropdown menu is open, and the 'Approved' option is highlighted with a blue arrow. The form includes sections for General, Bill Address, Ship Address, and Summary.

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	TAX CODE	CLEARED	ACTIONS
1	FLOWER123	Box of 24 Roses	1.000	0.000	Box	10.00	10.00	Tax	<input type="checkbox"/>	GF
2	FLOWER123A		1.000	0.000	EA	10.00	10.00	Tax	<input type="checkbox"/>	GF

When you are ready to process the Sales Order, select **Approved** from the status drop down menu .

The approval process will depend on your company's Sales Order approval setting.

- Manager's approval might be required for Approving the Sales Order.
  - The manager will receive a notice to approve. Once approval is provided, you can proceed to create a Ship Doc.
- Based on your approval settings, a Sales Representative can approve Sales Order. (See [User Roles](#) process for steps.)

Once the status of Sales Order is set to Approved, it becomes 'read only' i.e. the record cannot be edited anymore.

## Creating a PDF for your Sales Order

A Sales Order can be printed and emailed to your customer.

1. Click the **Create PDF** icon next to the Sales Order number.

Sales > Sales Orders > Sale Order

Sales Order - 3 Create PDF EDIT

General	Bill Address	Ship
No. 3 Customer ABCCom	COMP1 123	COM 123

- The PDF version of the Sales Order will open.
- Click the *Save and Email* button to send out the PDF file. Alternatively, you can Save (only) the PDF file by clicking the *Save* button.**

SALES ORDER All Orders Demo

All Orders Demo  
4651 Sheridan St  
Hollywood, FL 33021  
No. 3953  
Date Object reference not set to an instance of an object.  
Terms Object reference not set to an instance of an object.  
Promise Date: 8/4/2017

BILL TO	SHIP TO
General Dynamics 2915 NW Sunrise, FL 33322	General Dynamics 2015 NW Sunrise, FL 33322

ITEM	DESCRIPTION	QUANTITY	UCM	PRICE	EXT.	
01200B	Rear axle shaft GT-5, rt hand	1.000	EA	558.88	558.88	
01023A	Wheel lug nut, chrome (5)	1.000	CS	116.76	116.76	
01025A	Brake rotor, fit., non-vent	1.000	EA	181.44	181.44	
Prepared By: Ian Benoliel					Sub-Total	857.08
Memo:					Shipping	0.00
					Taxes	0.00
					Total	857.08

Save Save and Email Close

- The ***Send Email*** screen will pop up. Fill out the fields. You will have the option to attach additional information, carbon copy individual in your company.
- An email template is provided, select the appropriate template from the Template drop down box.
- Click **Send**.

**Send Email**

Contact:

Additional To:

CC:

BCC:

Template:

Subject:

Body:

Attachment:

FILE:	SIZE:	ACTION:
Sales Order_3_1.pdf	86.6 KB	<input type="button" value="x"/>

Once the Sales Order has been approved, you can proceed to **generating a Ship Doc** . A Ship Doc is the final step to completing a sales transaction; the document will display the fulfillment stage (i.e. Committed, Picked, Shipped, Voided etc.)

**Next:** *Ship Docs*

## [More about Order Management with Order Time](#)