Sales Order

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Sales Order Object

Sales Order is a transaction involved in the sales cycle. Like all transactions it is comprised of a Doc portion (Sales Order) and one or more Line Items (SalesOrderLineItem).

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End Point

/salesorder

GET, POST, PUT, DELETE

GET and DELETE requests expect parameter docNo of type Int32.

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Properties - Sales Order

Property	Caption	Data Type	Required	Can Update with PUT
CustomerRef	Customer	EntityRef	True	False
ShipToRef	Ship To	EntityRef	True	True
DocNo	No.	Int32	False	False
CustomerPO	Customer PO	String (25)	False	True
Date	Date	DateTime	True	True
PromiseDate	Promise Date	DateTime	True	True
StatusRef	Status	EntityRef	False	True
ClassRef	Class	EntityRef	False	True
ContactRef	Contact	EntityRef	False	True

CurrencyRef	Currency	EntityRef	False	True
FOB	FOB	String (50)	False	True
InternalNotes	Internal Notes	String (4000)	False	True
Memo	Memo	String (4000)	False	True
ShippingInstructions	Shipping Instructions	String (4000)	False	True
LocationRef	Location	EntityRef	False	True
ItemSalesTaxRef	Sales Tax	EntityRef	False	True
TaxRateIsOverriden **(see note)**	NA	Boolean	False	False
ItemSalesTaxRate **(see note)**	Rate	Decimal	False	False
DiscountRef	Discount	EntityRef	False	True
DiscountAmount	Discount Amount	Decimal	False	True
DiscountSalesTaxCodeRef	Discount Tax Code	EntityRef	False	True
AdditionalFeeItemRef	Additional Fee Item	EntityRef	False	True
AdditionalFeeSalesTaxCodeRef	Additional Fee Tax Code	EntityRef	False	True
AdditionalFeeAmount	Additional Fee Amount	Decimal	False	True
ShipMethodRef	Shipping Method	EntityRef	False	True
ShipAmount	Shipping Amount	Decimal	False	True
ShipSalesTaxCodeRef	Shipping Tax Code	EntityRef	False	True

SalesRepRef	Sales Rep	EntityRef	False	True
TermRef	Terms	EntityRef	False	True
ExchangeRate	Exchange Rate	Decimal	False	True
BillAddress	Bill Address	CustomerAddress	False	True
ShipAddress	Ship Address	CustomerAddress	False	True
AllowShipPartial	Allow Ship Partial	Boolean	True	True
LineItems	Items	Array of SalesOrderLineItem	False	False
CustomFields	Custom Fields	Array of CustomFieldData	False	True

> In order to override the tax rate populate the ItemSalesTaxRef, set TaxRateIsOverriden = true and provide a ItemSalesTaxRate in decimal formal (e.g, If the tax rate is 7.5% ItemSalesTaxRate should be 0.075)

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Properties - Sales Order Line Item

Property	Caption	Data Type	Required	Read Only
$type	This property MUST be included to tell the API what type of item is being added. The value should be "AOLib7.SalesOrderLineItem, AOLib7"			
Id	Id	Int32	False	True
LineNo	Line No	Int16	False	True
ItemRef	Item	EntityRef	True	False
Description	Description	String (4000)	False	False
LineInstructions	Line Instructions	String (4000)	False	False
SalesTaxCodeRef	Tax Code	EntityRef	False	False
UomRef	UOM	EntityRef	False	False
UomConversionRate	UOM Conversion Rate	Decimal	False	False
Price	Price	Decimal	True	False
Quantity	Quantity	Decimal	True	False
StdCost	Std. Cost	Decimal	False	True

StdPrice	Std. Price	Decimal	False	True
CustomerPartNo	Customer Part No	String (50)	False	False
CustomFields	Custom Fields	Array of CustomFieldData	False	False

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Json Sample

In order to create a sales order all you really need is the CustomerRef. To add Line items, all you need is the ItemRef, Quantity and Price. Order Time will fill in default customer and item information automatically. Only include additional properties if you want to override the defaults. Here are some other rules:

- In order to override the exchange rate, you must also include a CurrencyRef
- In order to apply a discount, you must also include a DiscountRef
- In order to apply shipping, you must also include a ShipMethodRef
- In order to override the Unit of Measure conversion rate, you must also include a UomRef.


```
{
   "CustomerRef": {
      "Id": 21,
      "Name": "Basket Case"
   },
   "ShipToRef": {
      "Id": 2,
      "Name": "Store 56"
   },
 "Date": "2018-10-21T00:00:00",
   "PromiseDate": "2018-10-21T00:00:00",
   "ShipAddress": {

      "Addr1": "Basket Case",
      "Addr2": "764 Harrison St",
      "Addr3": "",
      "Addr4": "",
      "City": "San Francisco",
      "State": "CA",
      "Zip": "94107",
      "Country": "USA",
      "Contact": " ",
      "AltContact": "",
      "Phone": "1025556665",
      "AltPhone": "1015553001",
      "Fax": "",
      "Email": "shop@basketcase.co",
 "Website": "",
      "UpdateCustomerRecord": false
   },
   "ShippingInstructions": "Knock on the back door",
   "CustomerPO": "6T56-97",
   "LineItems": [
      {
         "$type": "AOLib7.SalesOrderLineItem, AOLib7",
         "ItemRef": {
            "Id": 37,
```

```
            "Name": "TSS - Grey - SN"
         },
         "Description": "Company Branded T-Shirt Large GREY Check out our website for other offers!",
         "Price": 42,
         "SalesTaxCodeRef": {
            "Id": 12,
            "Name": "Non"
         },
         "Quantity": 12,
         "CustomFields": [
            {
               "Name": "SOICust1",
               "Value": "Valve",
               "Caption": "H Code"
            }
         ]
      },
      {
         "$type": "AOLib7.SalesOrderLineItem, AOLib7",
         "ItemRef": {
            "Id": 37,
            "Name": "TSS - Grey - FSN"
         },
         "Description": "Company Branded T-Shirt XLarge GREY Check out our website for other offers!",
         "Price": 42.5,
         "SalesTaxCodeRef": {
            "Id": 12,
            "Name": "Non"
         },
         "Quantity": 6,
         "CustomFields": [
            {
               "Name": "SOICust1",
               "Value": "Dry",
               "Caption": "H Code"
            }
         ]
      }
   ],
   "ShipAmount": 15.00,
   "ShipMethodRef": {
            "Id": 12,
            "Name": "UPS"
         },,
   "ShipSalesTaxCodeRef":{
            "Id": 2,
            "Name": "Non"
         },
   "StatusRef": {
      "Id": 8,
      "Name": "Processing"
   },
 "CustomFields": [
      {
         "Name": "SOCust1",
         "Value": "2018-10-24T00:00:00",
         "Caption": "GTD"
      }
   ]
}
```


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Fulfilling a sales order

There are 2 ways to fulfill a sales orders through the API. The simplest method is to call CreateShipDocFromSO which emulates the UI create ship doc function.

Type: Post

End Point: /salesorder/CreateShipDocFromSO

Parameter: docNo Int32

The second way is to create the ship doc through the API will the LinkedLineItemInfo correctly pointing to the sales order to be fulfilled.

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