

Closing a Sales Order that has a Kit

Last Modified on 06/02/2020 4:09 pm EDT

In Order Time a Sales Order cannot be Closed if it has a Kit with line items that haven't been cleared.

The screenshot shows a sales order for 'Sales Order - 1239'. It includes fields for General, Bill Address, and Ship Address. A Summary section shows financial details like Subtotal, Ship Amount, Discount, and Total Amount. The main part of the screen is a table with columns: LINE NO., ITEM, DESCRIPTION, QUANTITY, FILLED, UOM, PRICE, EXT., STD. COST, MARKUP %, TAX CODE, CLEARED, AVAILABLE, PACK SIZE, and ACTIONS. Line 1 is 'MY KIT2 Great Kit' with a quantity of 1.00. Below it, a sub-table shows kit components: 'Qty Per' (1.00), 'Item' (100), 'Description' (Sushi Mori Moulds no plus), 'Price' (387.00000), 'Available' (2,490.00000), 'UOM' (EA), 'Std. Cost' (4,048.00), 'Markup %' (7.18), 'Tax Code' (FL-Palm Beach (7.00 %)), 'Parts' (2,404.50000), 'Spare Parts - Sencorp' (91.00000), and 'Color:Blue' (-1.00000).

In the default Matrix view all of the Kit components can be seen, but in order to clear them we need to perform a few actions.

Start off by clicking the cog in the items tab to manipulate this List.

Click on the Columns Tab and Add the Cleared Column. Then click Save as seen below.

The screenshot shows the 'List Options' dialog box open over the sales order interface. The dialog has three tabs: 'Filters', 'Columns', and 'Other'. The 'Columns' tab is active, showing a list of 'Available columns' on the left and 'Selected columns' on the right. The 'Available columns' list includes: Conversion Rate, Customer Part No, Discount %, Id, Image, Item Type, Line Instructions, Manually Cleared, Manufacturer Part No, and Margin %. The 'Selected columns' list includes: Filled, UOM, Price, Ext., Std. Cost, Markup %, Tax Code, Cleared, Available, and Pack Size. The 'Cleared' column is highlighted in red. There are 'Add', 'Remove', 'Top', 'Up', 'Down', and 'Bottom' buttons between the lists. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Then click on the Other Tab and change the View Type from Matrix View to Line View and hit Save:

Sales > Sales Orders > Sale Order

Sales Order - 1239 EDIT Create PDF Print Label Status Order

General
 No. 1239
 Customer 1111 Nelson Brothers Change
 Date 6/2/2020
 Promise Date 6/2/2020
 Customer PO
 Contact

Bill Address
 1111 NELSON BROTHERS
 2580 WYATT STREET FLOOR/SUITE
 BILL CARE OF
 WEST PALM BEACH, FL 33404

Ship Address
 1111 NELSON BROTHERS
 SHIP 2580 WYATT STREET SHIP FLOOR/SUITE
 SHIP CARE OF
 WEST PALM BEACH, FL 33021
 US

Summary Revision: 1
 Subtotal 116.45
 Ship Amount 0.00
 Discount -0.00
 FL-Palm Beach (7.00 %) 7.18
 Total Amount 123.63
 Paid Amount -0.00
 Balance 123.63

List Options

Filters Columns Other

Records per page 10
 Sort By Line No.
 View Type Matrix View
 Line View

Save Cancel

LINE NO.	ITEM	DESCR	QTY PER	ITEM	DESCRIPTION	AVAILABLE	CLEARED	AVAILABLE	PACK SIZE	ACTIONS
1	MY KIT2	Great	1.00	100	Sushi Mari Moulds no plus	387.00000	<input type="checkbox"/>			<input type="checkbox"/>
			2.00	101	1/4" Trays	2,490.00000	<input type="checkbox"/>			<input type="checkbox"/>
			1.00	105	Parts	2,404.50000	<input type="checkbox"/>			<input type="checkbox"/>
			1.00	110	Spare Parts - Sencorp	91.00000	<input type="checkbox"/>			<input type="checkbox"/>
			1.00	0932409-BL	Color:Blue	-1.00000	<input type="checkbox"/>			<input type="checkbox"/>

Here we can see each Line Item in the Kit and we can tell they haven't been Cleared:

Sales > Sales Orders > Sale Order

Sales Order - 1239 EDIT Create PDF Print Label Status Order

General
 No. 1239
 Customer 1111 Nelson Brothers Change
 Date 6/2/2020
 Promise Date 6/2/2020
 Customer PO
 Contact

Bill Address
 1111 NELSON BROTHERS
 2580 WYATT STREET FLOOR/SUITE
 BILL CARE OF
 WEST PALM BEACH, FL 33404

Ship Address
 1111 NELSON BROTHERS
 SHIP 2580 WYATT STREET SHIP FLOOR/SUITE
 SHIP CARE OF
 WEST PALM BEACH, FL 33021
 US

Summary Revision: 1
 Subtotal 116.45
 Ship Amount 0.00
 Discount -0.00
 FL-Palm Beach (7.00 %) 7.18
 Total Amount 123.63
 Paid Amount -0.00
 Balance 123.63

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

Name/Number Search Item Scan

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	STD. COST	MARKUP %	TAX CODE	CLEARED	AVAILABLE	PACK SIZE	ACTIONS
1	100	Sushi Mari Moulds no plus	1.00	0.00	EA	6.95	6.95	6.00	16.00 %	Non	<input type="checkbox"/>	387.00000		<input type="checkbox"/>
2	101	1/4" Trays	2.00	0.00	EA	1.25	2.50	35.00	-96.00 %	Tax	<input type="checkbox"/>	2,490.00000		<input type="checkbox"/>
3	105	Parts	1.00	0.00	EA	4.00	4.00	0.00	0 %	Non	<input type="checkbox"/>	2,404.50000		<input type="checkbox"/>
4	110	Spare Parts - Sencorp	1.00	0.00	EA	3.00	3.00	22.00	-86.00 %	Non	<input type="checkbox"/>	91.00000		<input type="checkbox"/>
5	0932409-BL	Color:Blue	1.00	0.00	EA	100.00	100.00	3,950.00	-97.00 %	Tax	<input type="checkbox"/>	-1.00000		<input type="checkbox"/>

Click on each Line Item and click on the checkbox in the Cleared Column to Clear each one individually:

Sales > Sales Orders > Sale Order

Sales Order - 1239 EDIT Create PDF Print Label Status Order

General
 No. 1239
 Customer 1111 Nelson Brothers Change
 Date 6/2/2020
 Promise Date 6/2/2020
 Customer PO
 Contact

Bill Address
 1111 NELSON BROTHERS
 2580 WYATT STREET FLOOR/SUITE
 BILL CARE OF
 WEST PALM BEACH, FL 33404

Ship Address
 1111 NELSON BROTHERS
 SHIP 2580 WYATT STREET SHIP FLOOR/SUITE
 SHIP CARE OF
 WEST PALM BEACH, FL 33021
 US

Summary Revision: 1
 Subtotal 116.45
 Ship Amount 0.00
 Discount -0.00
 FL-Palm Beach (7.00 %) 7.18
 Total Amount 123.63
 Paid Amount -0.00
 Balance 123.63

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

Name/Number Search Item Scan

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	STD. COST	MARKUP %	TAX CODE	CLEARED	AVAILABLE	PACK SIZE	ACTIONS
1	100	Sushi Mari Moulds no plus	1	0.00	EA	6.95	6.95	6	16	Non	<input checked="" type="checkbox"/>	387.00000		<input type="checkbox"/>
5	0932409-BL	Color:Blue	1.00	0.00	EA	100.00	100.00	3,950.00	-97.00 %	Tax	<input type="checkbox"/>	-1.00000		<input type="checkbox"/>

Once every Item has been Cleared you'll see check marks next to each one in the Cleared Column and the Status will automatically update to Closed:

Sales > Sales Orders > Sale Order Created By Ian Benoit 6/2/2020 3:36 PM Modified By Ian Benoit 6/2/2020 3:42 PM

Sales Order - 1239 TRANSFER [Create PDF](#) [Print Label](#) Status: Closed

General No. 1239 Customer 1111 Nelson Brothers Change Date 6/2/2020 Promise Date 6/2/2020 Customer PO Contact	Bill Address 1111 NELSON BROTHERS 2550 WYATT STREET FLOOR/SUITE BILL CARE OF WEST PALM BEACH, FL 33404	Ship Address 1111 NELSON BROTHERS SHIP 2550 WYATT STREET SHIP FLOOR/SUITE SHIP CARE OF WEST PALM BEACH, FL 33021 US	Balance 123.63 Summary <small>Revision: 1</small> Subtotal 135.33 Ship Amount 0.00 Discount -0.00 FL-Palm Beach (7.00%) 8.49 Total Amount 143.82 Paid Amount -0.00 Balance 143.82
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Items **Details** Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	STD. COST	MARKUP %	TAX CODE	CLEARED	AVAILABLE	PACK SIZE
1	100	Sushi Mori Moulds no plus	1.00	0.00	EA	6.95	6.95	6.00	16.00 %	Non	☑	387.00000	
2	101	1/4" Trays	2.00	0.00	EA	1.40	2.80	35.00	-96.00 %	Tax	☑	2,490.00000	
3	105	Parts	1.00	0.00	EA	4.00	4.00	0.00	0 %	Non	☑	2,404.50000	
4	110	Spare Parts - Sencorp	1.00	0.00	EA	3.08	3.08	22.00	-86.00 %	Non	☑	91.00000	
5	0932409-BL	Color:Blue	1.00	0.00	EA	118.50	118.50	3,950.00	-97.00 %	Tax	☑	-1.00000	

You can always swap back to the Matrix View afterwards by clicking on the cog, going to the Other Tab, selecting it and hitting Save.