Creating Sales Orders

Navigate to Customers and Sales → Sales Orders → Sales Orders

Sales Order Area

Enter the Customer ID and [Tab]. Use Value lookup if necessary. Several fields will update with information attached to the customer’s record.

Enter a hyphen (–) in the Responsible field. Although not used this is a mandatory field, so must contain data.

Choose your own name from the Salesman drop-down list.

If the Customer has provided a Purchase Order enter the PO number in the External Reference field.

Enter the Subproject code. This will update the GL information for all of the order rows.

Order Lines Section

Click Add to create a new order row.

Enter the Product and [Tab].

Update the default Description if necessary. This information appears on the sales invoice.

Enter the Quantity.

Enter the Price. The system will complete the rest of the row.

Add any additional rows by repeating steps 1 – 5.
Creating Sales Orders

**Detailed Information and GL Analysis Sections**

- **Detailed Information**
  - **Product**
    - **Product text**
  - **Amount**
    - **Amount use**
    - **Discount percent**
    - **Discount**
    - **Tax percent**
    - **Tax code**
  - **Workflow**

- **GL Analysis**
  - **Account**
  - **Cost**
  - **Project**
  - **Subproj**
  - **Tax code**
  - **Tax system**
  - **Percentage**
  - **Amount**

**Splitting Costs**

If the income from one sales row needs to be split between multiple budgets use the split row function.

1. Click **Split row** beneath the **GL Analysis** table to create a new row.
2. Amend the **Subproj** of the new row to indicate the additional budget.
3. Amend the **Percentage** or **Amount** fields to indicate how the income is to be split between the two subprojects. The system will calculate the other field. Create additional rows if required, ensuring that the total percentage of all of the rows adds up to 100%.

**Saving the Sales Order**

- When the sales order is complete click **Save** in the tools ribbon.
- The **Posting cycles** dialogue window will appear.
- In the **Posting cycles** screen, click the **SO Sales Order** option.
- Click **OK**. A confirmation message containing an order number will appear.
- The Sales Order will now be sent for approval via the automated workflow. Positive orders will become **Sales Invoices**, negative orders will become **Credit Notes**.

Please see the e-Learning Sales Order materials for more detailed information and additional functions.