Invoicing from a Sales Order in Syspro (Marketing Orders) –

No charge Orders -

Open Sales Order Entry. Click “Function” and then click “Sales Order Maintenance.

Enter Sales Order number.

Graphical user interface, application

Description automatically generated

Under the “Order Header” Column, scroll down to the “Carrier” Line and enter the Carrier (there is a drop-down menu to choose the carrier) –Table

Description automatically generated

Continue to scroll down to the “PRO Number” line and enter the Pro Number-

Graphical user interface, application

Description automatically generated

Change the “Order Status” to Status 8- To Invoice and click “Accept”. Graphical user interface, application, table

Description automatically generated

Click “End Order”. “Document to print” to be “Invoice and “Document format” should be “Optio Syspro”.

Click “Print.

On Print popup, click “OK”.

Reprint Document pop up – Click close

Orders with Deposits –

Follow the same instructions until you click “End Order”.

Then click “Take Payment”.

Apply the deposit and save.

Click Print and click “OK” to print.

Reprint Document click “cancel”

Invoicing regular Sales Orders directly from Syspro are done the exact way with the exception that the carrier and Pro information isn’t entered.