

Milestone 6:Sales

Activity 1:Sales order creation

3:00 PM

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Search in Sales Orders

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New Sales Order

Customer Name*

Select or add a customer

Sales Order#*

SO-00006

Reference#

Sales Order Date*

17/10/2023

To create transaction dated before 01/07/2023, click here

Expected Shipment Date

ddMM/yyyy

Payment Terms

Due on Receipt

Delivery Method

Select a delivery method of 1

Salesperson

Select or Add Salesperson

Bulk Update Line Items

ITEM DETAILS	QUANTITY	RATE	TAX
Type or click to select an item.	1.00	0.00	Select a Tax

Add another line

Sub Total

0.00

Discount

0 %

0.00

Adjustment

0.00

Total (₹)

0.00

Customer Notes

Enter any notes to be displayed in your transaction

Terms & Conditions

Enter the terms and conditions of your business to be displayed in your transaction

Attach File(s) to Sales Order

Upload File

You can upload a maximum of 10 files, 5MB each.

Additional Fields: Add custom fields to your sales orders by going to Settings → Sales → Sales orders → Field Customization

Save as Draft

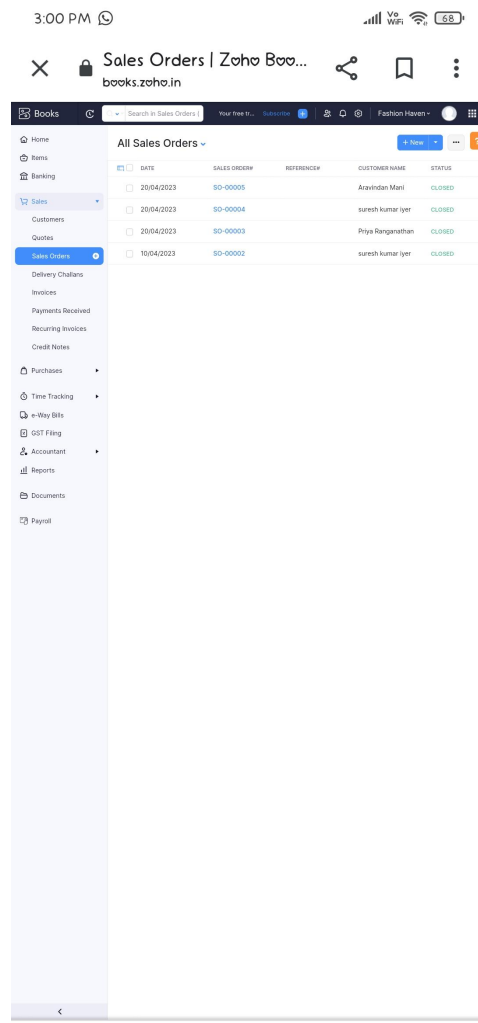
Save and Send

Cancel

Total Amount: ₹ 0.00

Total Quantity: 0

Activity 2:Sales order to sales invoice conversion



Activity 3: Direct sales invoices

3:00 PM

V

WiFi

51

Add New | Invoices | Zoho...
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Books

Search In Invoices (1)

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New Invoice

Customer Name*

Select or add a customer

Invoice#

INV-000009

Order Number

Invoice Date*

17/10/2023

Terms

Due on...

Due Date

17/10/2023

Salesperson

Select or Add Salesperson

Subject

Let your customer know what this invoice is for

ITEM DETAILS

QUANTITY

RATE

TAX

Type or click to select an item.

100

0.00

Select a Tax

Add another line

Sub Total

0.00

Discount

0 %

0.00

TDS

TC

Select a...

-0.00

Adjustment

0.00

Customer Notes

Thanks for your business.

Total (₹)

0.00

Terms & Conditions

Enter the terms and conditions of your business to be displayed in your transaction

Attach File(s) to Invoice

Upload File

Want to get paid faster?

Configure payment gateways and receive payments online. Set up Payment Gateway

Additional Fields: Start adding custom fields for your invoices by going to Settings → Sales → Invoices.

Save as Draft

Save and Send

Cancel

Make Recurring

Total Amount: ₹ 0.00

Total Quantity: 0

Activity 4: Receive payment

Activity 5: Reconciliation of open invoices

3:00 PM



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All Invoices

DATE

INVOICE#

ORDER INVOICE#

CUSTOMER

STATUS

DUE DATE

AMOUNT

SALANCE

02/10/2023

3

INV-000008

SO-000003

Priya Ranganathan

DRAFT

02/10/2023

₹5,25,000.00

₹5,25,000.00

02/10/2023

3

INV-000007

SO-000005

Aaravindan Mani

PAYD

02/10/2023

₹1,68,000.00

₹0.00

02/10/2023

3

INV-000004

SO-000004

suresh kumar iyer

PAYD

02/10/2023

₹1,26,000.00

₹0.00

20/04/2023

3

INV-000003

Aaravindan Mani

PAYD

20/04/2023

₹1,68,000.00

₹0.00

02/10/2023

3

INV-000002

SO-000003

Priya Ranganathan

PAYD

02/10/2023

₹5,25,000.00

₹0.00

02/10/2023

3

INV-000001

SO-000002

suresh kumar iyer

PAYD

02/10/2023

₹1,05,000.00

₹0.00