ZOHO FINALS-SALES ORDERS - GINTO

Sidebar contain '**Sales Orders**' tab, if we click on **'Sales Orders**' it redirects to the list out page, which contain list of sales orders transactions and their details. If we click on to the **'+'** then it opens to a create sales order page, where we can create a new sales order.

SALES ORDERS LIST OUT:

'**All Sales Orders'** page displays all sales orders transactions. In this page,

- **Import** new sales order details from other sources and **Export** sales orders details to Excel
- A **search box** to filter the sales order details while typing any sales order related details, like date, sales order number, customer name, or balance.
- **Sort** - Sort out the sales order details in ascending order based on customer name and sales order number.
  - **All**
  - **Name –** Customer Name
  - **SO No** – Sales Order Number
- **Filter** – Filter out the sales orders based on the status.
  - **All**
  - **Draft**
  - **Saved**
- **NEW** – New button to open create page to add new sales order.
- Below that have a table to list out the details of all sales orders. The table contain,
  - **DATE**– Sales Order date
  - **SALES ORDER NUMBER**
  - **CUSTOMER NAME**

- **CUSTOMER MAIL ID**
- **AMOUNT** – Sales order total amount
- **STATUS –** Either **Draft** or **Sent.**
- **BALANCE** - Amount after paid.
- **ACTION** – By clicking **'Convert'** we can convert a sales order into invoice, or recurring invoice. Action contains a dropdown we can choose any one these 2 and the sales order converted to selected option. After conversion instead of dropdown here show 'Converted to selected option and its number'. We cannot convert same sales order more than once after conversion it is completed.

Eg : If we are converted sales order to invoice, after conversion show 'Converted to Invoice INV-01'.

CREATE SALES ORDER:

We can create sales order in three different pages in Zoho. From the sidebar by clicking **'+'** , from the 'All Sales Order' page by clicking **'NEW'** or from the overview page has a button **'NEW'** to create new sales order.

In '**New Sales Order'** page

➢**Customer Name*** – Show the list of all customer from customer's table based on the company and customer status is 'Active'. We can type and search customer name in the dropdown to filter out the customer.

➢By clicking **'+'** we can create new customer and list out in the customer dropdown dynamically.

➢If we select a customer from the dropdown, display following fields with information automatically.

▪**Customer Email ID –** Selected customer's mail id

▪**Billing Address**

▪**GST Treatment** - Selected customer's GST type

▪**GST Number -** Show if customer table contain GST number.

▪**Place of Supply** – In the dropdown Customer's shipping state as selected. And we can change place of supply if we want.

➢**Sales Order Number** – We can type sales order number based on the company needs. Number followed by with or without pattern is possible. Show next possible sales order number with pattern automatically and we can change it. If we change show an alert message of changed pattern or number. But we can save with changed value also.

➢**Reference Number** – Serial number show automatically. If one record gets deleted show the next reference number of deleted record.

➢**Sales Order Date –** Display today's date, and we can change it if we want.

➢**Payment Terms** – List to show default payment terms. And we can add new payment term by clicking **'+'** next to the payment term field. Default payment terms are,

▪**NET 30**

▪**NET 60**

▪**Due on Receipt**

➢**Expiration Date** – Date based on sales order date and given payment type days.

➢**Payment Method**– To select the type of payment method. List contains,
▪**Cash**
▪**Cheque**
▪**UPI**
▪**List of Banks given**
➢If we select 'Cheque' show an input field to enter cheque number. If we select 'UPI' show the field to enter UPI Id. If we select any of the 'Banks' show the field and display the account number automatically given in the bank details.
➢Table to choose items for the sales order. We can add multiple rows. Clicking **'+'** button row gets created dynamically and we can add item. Table contains,
▪**Index – Row number show automatically**
▪**Item -** Show the list of all items from item table based on the company and item status is 'Active'. We can type and search item in the dropdown to filter out the item.
▪By clicking **'+'** we can create new item and list out in the item dropdown dynamically.
▪**HSN** – While selecting an item show its HSN here
▪**Quantity** – We can type an enter quantity
▪**Rate** – Item **sales** rate displays here
▪**Discount** – We can enter discount
▪**Tax** – Show tax rate based on place of supply. If place of supply in invoice and company state is same show item's **GST Tax** rate by default, which is given in the item table and we can change here if we want. The **GST Tax** rate options are,
▪**0% GST**
▪**3% GST**
▪**5% GST**
▪**12% GST**
▪**18% GST**
▪**28% GST**
▪If place of supply and company state is different show item's I**GST Tax** rate by default, which is given in the item table and we can change here if we want. The **IGST Tax** rate options are,
▪**0% GST**
▪**0% IGST**
▪**3% IGST**
▪**5% IGST**
▪**12% IGST**
▪**18% IGST**
▪**28% IGST**
▪**Amount** – item's total rate
✓**Amount = (Quantity*Rate) - Discount**
▪**Remove** button. To copy the selected row and add another row with same value row or to delete selected row.
➢**Sub Total** It will automatically generate a value, which will be Amount in the item table. If there are multiple items, the subtotal will be the total amount of the values in the 'Amount' field in the table.

➢**IGST, CGST, SGST**: If the 'Tax' is GST, it will display two fields, **CGST** and **SGST**, each containing half the value of the GST. If the 'Tax' is IGST, it will display the same IGST value in **IGST** field.

➢**Tax Amount** If the 'Tax' is GST, it will display tax amount as CGST+SGST else tax amount is IGST

➢**Shipping Charge –** Field to enter shipping charge if needed

➢**Adjustment** An input field for entering the round-off value, which can be zero or any amount. We can add or reduce total.

➢**Total** It will automatically generate a value.

✓**Total = Subtotal+ Tax amount+ Shipping Charges + Adjustment**

➢**Customer Note** – Any description about sales order. (Optional)

➢**Terms & Conditions** – We can enter terms and conditions here. (Optional)

➢**File -** We can upload document for the sales order. (Optional)

➢**Draft -** Button to save sales order to the database as 'Draft'. After save redirect to the list out sales orders page.

➢**Save –** Button to save sales order to the database as 'Saved', After save redirect to the list out sales orders page.

➢**Cancel** – Cancel and reload the create sales order page.

SALES ORDER OVERVIEW PAGE:

If click on the any of the transaction in sales order list out page it redirects to the overview page.

Show all content given in add sales order page should be displayed in overview page. In this page there is two sections. Left section shows all sales orders listing and right section shows details of each selected sales order from left listing.

Left Section '**All Sales Orders'** includes,

➢A **search box** to filter the sales order details while typing any sales order related details, like date, sales order number, customer name, or balance.

➢**Sort** - Sort out the sales orders details in ascending order based on customer name and sales order number.

- **All**
- **Name –** Customer Name
- **SO No** – Sales Order Number

➢**Filter** – Filter out the sales orders based on the status.

- **All**
- **Draft**
- **Saved**

➢**NEW** – New button to open create page to add new sales order.

➢Below this contain sales order details,

▪**Sales Order**

▪**Sales Order ID**

▪**Balance amount**

▪**Status** of sales order '**Saved**' or '**Draft**'

Right Section includes,

➢Show selected **Sales Order** on top.
➢**Overview** button to show all details of the selected sales order given in the sales order database table.
➢**Templates - 3 Templates** designs with following details,
▪**Sales Order**
▪**Sales Order status**
▪**Company details**
▪**Customer Details**
▪**Item details**
▪**Sales Order Number**
▪**Sales Order Date**
▪**Subtotal**
▪**Tax Amount**
▪**IGST, CGST, SGST**: If the 'Tax' is GST, it will display two fields, **CGST** and **SGST**, each containing half the value of the GST. If the 'Tax' is IGST, it will display the same IGST value in **IGST** field.
▪**Shipping Charge –** Only if it there is a shipping charge
▪**Adjustment –** If present
▪**Total Amount**
➢**Slip** with following details,
▪**Sales Order**
▪**Sales Order status**
▪**Company details**
▪**Customer Name only**
▪**Item details**
▪**Sales Order Number**
▪**Sales Order Date**
▪**Subtotal**
▪**Tax Amount**
▪**IGST, CGST, SGST**: If the 'Tax' is GST, it will display two fields, **CGST** and **SGST**, each containing half the value of the GST. If the 'Tax' is IGST, it will display the same IGST value in **IGST** field.
▪**Shipping Charge –** Only if it there is a shipping charge
▪**Adjustment –** If present
▪**Total Amount**
➢**Edit** – By clicking Edit it redirects to the edit sales order page, where we can edit sales order details we added to the database.
➢**Share –** Share the template through **WhatsApp** and **Email**
➢**Print –** Print templates and slip.
➢**PDF –** Can take templates and slip PDF
➢**Comment** – We can add and view comment for sales order
➢**Attach** – Dropdown with '**Attach File'** option, where we can attach document here. If we attached any document show option '**Download File'** to download the document in attached.
➢**Delete** – We can delete sales order.
➢If the sales order status is 'Draft' show '**Convert**' and if click on it change status to 'Saved' and hide the button. If the status is 'Saved' do not need to show the button.

If we add or edit sales order, the created or altered date and name of created or altered person should be displayed in the transaction history.