Sale Order Management System - Complete Documentation

1. System Overview

The Sale Order Management System is a comprehensive solution for handling customer orders, inventory management, production workflows, and fulfillment processes. The system supports both standard orders and made-to-order production workflows with complete tracking from order placement to delivery.

2. Create Form Operations

The Create Form allows users to initiate new sale orders with several helpful functions.

2.1. Order Creation Process

Create Button Functionality: -

sale_type : By default, the value is Advance order: Default selection with user option to change via dropdown

- sale_type = Others: Generates order number as SOO-2509-00001 (vs SO-2509-0001 for advance orders)

Customer Selection: Automatically calculates taxes based on customer's state (intra/inter-state)

- Product Pricing: Calculates rates based on customer category (wholesaler, retailer, etc.) Status Management:

- flow status and order status: these fields are hidden in create form & Default values: flow_status = 'Review for Inventory' order_status = 'Pending'

- Workflow Toggle: - If use_workflow is checked: Creates sale order with workflow (flow_status = 'Review for Inventory')

- If use_workflow is unchecked: Creates sale order without workflow (flow_status = 'Ready for Invoice')

2.2. Create Form Buttons

Options include Quick Pack, Copy, Past Order, and Sale Order List for streamlined order creation.

- Quick Pack Button: Sale order creation with Quick pack option

- Copy: Copies content from one form to another

- Past Order: Sale order creation using customer's past orders

- Sale Order List: Fetches list of sale orders

3. Edit Form Operations

Edit Form provides advanced functionality including invoice creation, product additions, and soft delete handling.

3.1. Create Invoice Button

Allows creation of invoices directly from sale orders once they are ready for invoicing.

- Visibility: Displayed when flow_status = 'Ready for Invoice'
- Function: Creates invoice record from sale order (shortcut method)
- Post-invoice creation effects:
    * Selected product checkboxes become disabled
    * Users cannot select these products again
    * Products marked as invoiced = 'Yes'
- Status visibility: flow_status and order_status fields are displayed in edit form
- Add Products button: Allows adding multiple products to existing sale order

3.2. Delete Functionality

- Soft delete: When user deletes a sale order, is_deleted = True (record becomes inactive)
- Reactivate: Users can reactivate deleted records using the reactivate action

3.3. GET Operation

Provides order lists with essential fields for monitoring and management.

3.4. Documents Operations

Supports sending order documents via Email, WhatsApp, Preview, and Print options.

4. Status Definitions

Flow Status and Order Status provide clarity on the current state of each order.

Flow Status Details

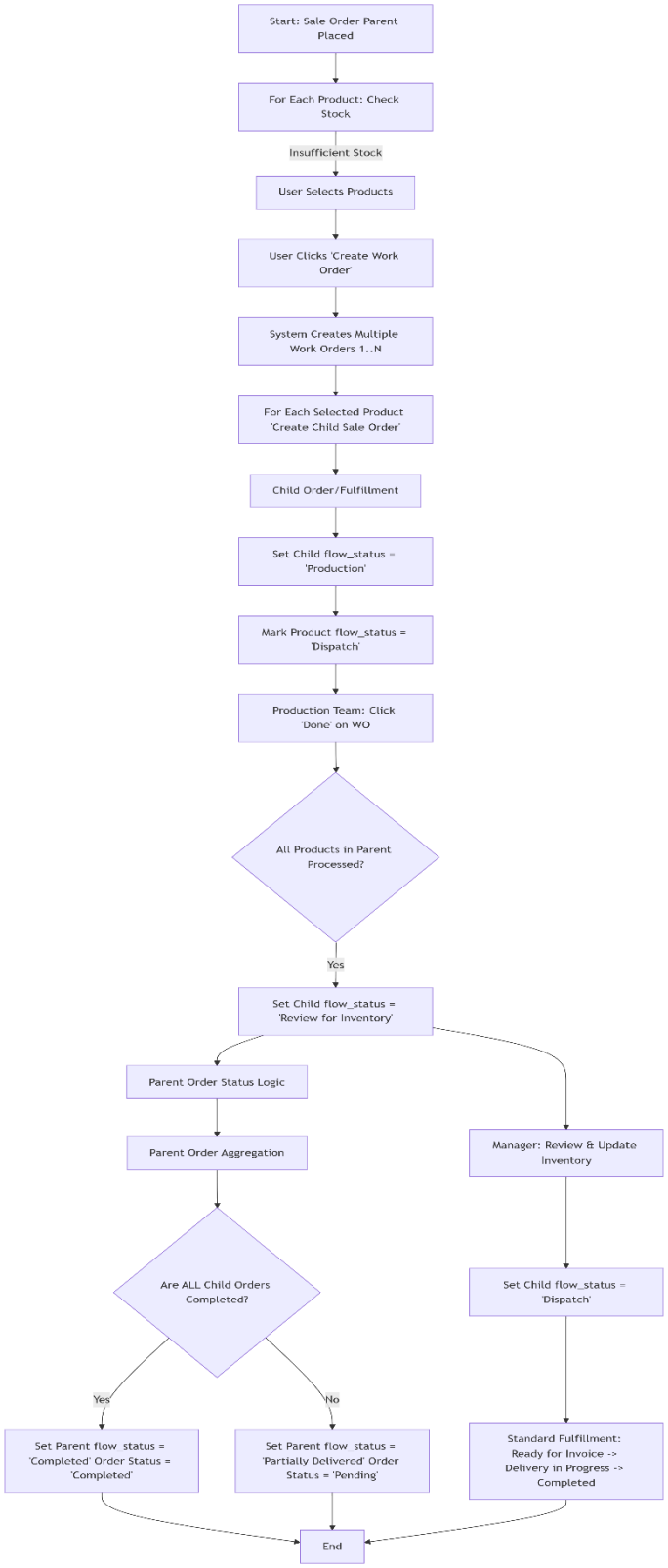
Flow Status	Explanation
Review for Inventory	Order is under review to check product availability in stock.
Dispatch	Order is packed and dispatched for delivery.
Production	Items are being produced or assembled as per the order.
Ready for Invoice	Order is approved and ready for invoice generation.
Delivery in Progress	Order is on the way to the customer.
Partially Delivered	Only part of the order has been delivered.
Confirmed	Order is confirmed and finalized.

Order Status Details

Order Status	Explanation
Pending	Order is still in progress and awaiting completion.
Completed	Order is fully processed and closed.

5. Work Order Management System

Work orders can be created from sale orders and managed with detailed workflows covering stock checks, production, and fulfillment.



6. System Integration Points

Includes Inventory Management (automatic stock updates),

Production Tracking (work order creation and monitoring), and

Customer Communication (Email/WhatsApp integration).

7. User Roles and Permissions

Sales Personnel manage orders,

Production Teams update status,

Inventory Managers review stock, and

Administrators handle configuration and reporting.

8. Error Handling and Validation

Ensures workflow validation,

order validation,

audit trails for data integrity.

9. Reporting and Analytics

Generates detailed reports including order summaries,

inventory status,

performance metrics.

10. System Configuration

Allows customization of numbering schemes,

workflow statuses,

integration options.