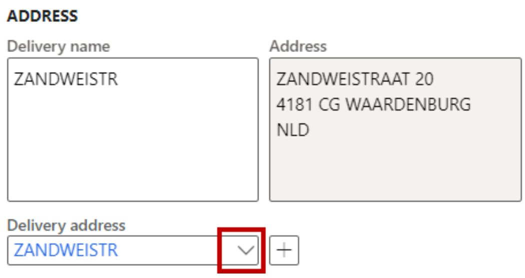
User guide manage sales orders (#1)

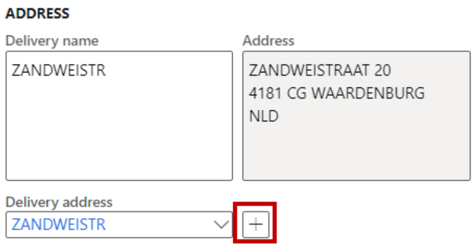
Contents

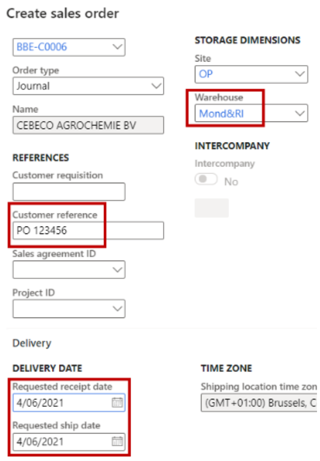
1.1 Order entry

1. Go to Sales and marketing > Sales orders > All sales orders.
2. Click New.
3. In the Customer account field, select or type a customer account
4. a) Optional: In the Delivery address field, click on the drop down to select an existing delivery address

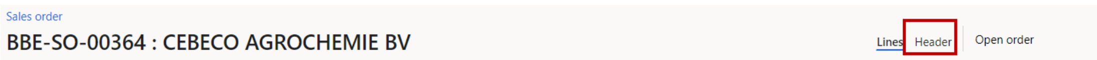


b) Optional: In the Delivery address field, click on the Plus sign to add a new delivery address (if the customer is exceptionally delivered on another address – make sure to set One-time to Yes).

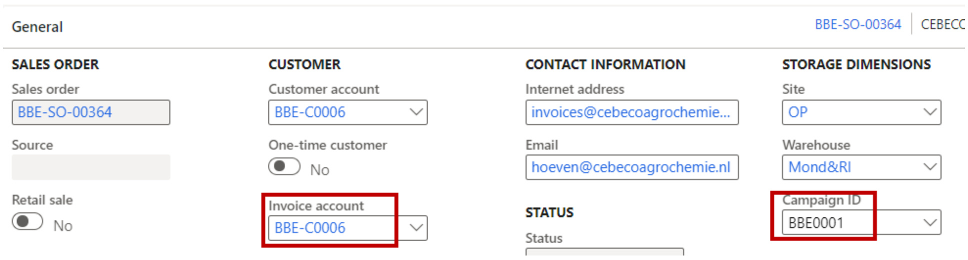




5. In the Warehouse field, check or update the warehouse.
6. In the Customer reference field, type a value.
7. In the Requested ship date field, enter or select a ship date.
8. Optional: In the Mode of delivery field, select another mode of delivery.
9. Click on the OK button. The sales order lines open. Go to the sales order Header



10. In the Campaign ID field, check or update the current Campaign ID.
11. The Invoice account can be consulted and or updated in the Invoice account field



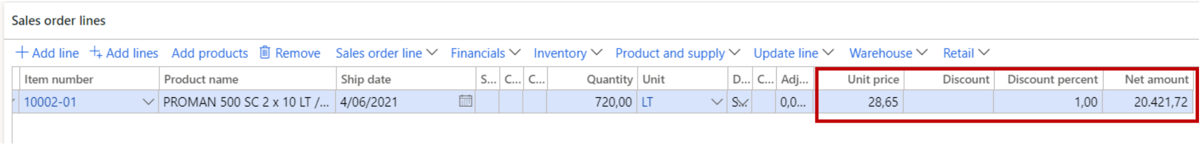
12. Add the Transport Partner / Priority (fields to be developed).

13. Go back to the 'Lines' of the sales order.

14. To add lines, enter or select an item number in the Item number field

15. Enter the Quantity in the quantity field. By default the pallet quantity is entered on the sales order.

16. The price can be consulted in the Unit price, discount, discount percent and Net amount fields. I



17. Click Sales order line > Price details to open the Price details screen.

- The Detail section give more information about the price calculation of the sales order line.
- The Trade agreements section gives more information about the trade agreements that are applicable on the sales order line.
- The Rebates section shows if any rebate agreements are applicable on the sales order line.

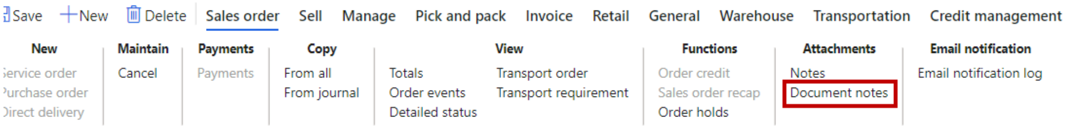
18. Click Sales order line > From item list to add items to the sales order from the Item list of the customer.

19. Click Financials > Maintain charges to consult/edit/add charges on the sales order line.

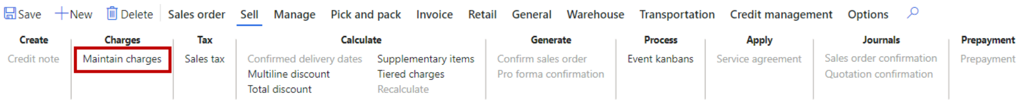
20. Click Sales order line > Document notes to add a note to your sales order line.

21. Click Inventory > On-hand inventory to consult the on hand inventory. (Change order type from Journal > Sales order to see impact of current sales order on the stock)

22. On the Action Pane, click Sales order > Document notes to add a note on header level.

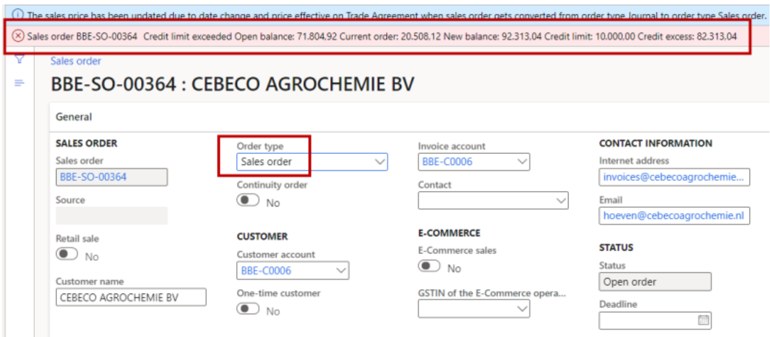


23. On the Action Pane, click Sell > Maintain charges to edit/add/consult the charges on sales order header.



24. Go back to the Header section of the Sales order.

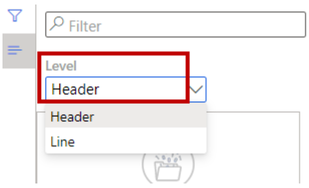
25. In the Order type field, change the Order type from Journal > Sales order when the sales order is ready to be processed. When the credit limit is exceeded a red warning message will appear on the screen.



26. Confirm the sales order. When the credit limit is exceeded the order will be sent to credit management for further review.

1.2 Auto charges

1. Go to Accounts receivable > Charges setup > Auto charges
2. By default the field is opened on the 'Header' charges. Select 'Line' to setup charges on Line level.



1.3 Retribution charges

1. Go to Accounts receivable > Charges setup Retribution charge