

# User guide manage sales orders (#1)

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## 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

**ADDRESS**

Delivery name	Address
ZANDWEISTR	ZANDWEISTRAAT 20 4181 CG WAARDENBURG NLD

Delivery address  
ZANDWEISTR ▼ +

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).

**ADDRESS**

Delivery name	Address
ZANDWEISTR	ZANDWEISTRAAT 20 4181 CG WAARDENBURG NLD

Delivery address  
ZANDWEISTR ▼ +

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

Create sales order

BBE-C0006

Order type  
Journal

Name  
CEBECO AGROCHEMIE BV

STORAGE DIMENSIONS  
Site  
OP

Warehouse  
Mond&RI

INTERCOMPANY  
Intercompany  
☐ No

REFERENCES  
Customer requisition

Customer reference  
PO 123456

Sales agreement ID

Project ID

Delivery

DELIVERY DATE  
Requested receipt date  
4/06/2021

Requested ship date  
4/06/2021

TIME ZONE  
Shipping location time zone  
(GMT+01:00) Brussels, C

[Sales order](#)  
BBE-SO-00364 : CEBECO AGROCHEMIE BV

[Lines](#) [Header](#) [Open order](#)

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

General

BBE-SO-00364 | CEBECC

<b>SALES ORDER</b> Sales order BBE-SO-00364 Source Retail sale <input type="radio"/> No	<b>CUSTOMER</b> Customer account BBE-C0006 One-time customer <input type="radio"/> No Invoice account BBE-C0006	<b>CONTACT INFORMATION</b> Internet address invoices@cebecoagrochemie... Email hoeven@cebecoagrochemie.nl <b>STATUS</b> Status	<b>STORAGE DIMENSIONS</b> Site OP Warehouse Mond&RI Campaign ID BBE0001
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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

Sales order lines

+ Add line+ Add linesAdd productsRemoveSales order lineFinancialsInventoryProduct and supplyUpdate lineWarehouseRetail

Item number	Product name	Ship date	S...	C...	C...	Quantity	Unit	D...	C...	Adj...	Unit price	Discount	Discount percent	Net amount
10002-01	PROMAN 500 SC 2 x 10 LT / ...	4/06/2021				720,00	LT			0,0...	28,65		1,00	20.421,72

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.

<a href="#">Save</a>	<a href="#">+ New</a>	<a href="#">Delete</a>	<a href="#">Sales order</a>	<a href="#">Sell</a>	<a href="#">Manage</a>	<a href="#">Pick and pack</a>	<a href="#">Invoice</a>	<a href="#">Retail</a>	<a href="#">General</a>	<a href="#">Warehouse</a>	<a href="#">Transportation</a>	<a href="#">Credit management</a>
<b>New</b>	<b>Maintain</b>	<b>Payments</b>	<b>Copy</b>	<b>View</b>	<b>Functions</b>	<b>Attachments</b>	<b>Email notification</b>					
Service order	Cancel	Payments	From all	Totals	Order credit	Notes	Email notification log					
Purchase order			From journal	Order events	Sales order recap	Document notes						
Direct delivery				Detailed status	Transport requirement							
					Order holds							

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

Save + New Delete Sales order <b>Sell</b> Manage Pick and pack Invoice Retail General Warehouse Transportation Credit management Options													
Create	Charges	Tax	Calculate			Generate		Process	Apply	Journals	Prepayment		
Credit note	Maintain charges	Sales tax	Confirmed delivery dates	Supplementary items		Confirm sales order		Event kanbans	Service agreement	Sales order confirmation		Prepayment	
			Multiline discount	Tiered charges		Pro forma confirmation				Quotation confirmation			
			Total discount	Recalculate									

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.

The sales price has been updated due to date change and price effective on Trade Agreement when sales order nets converted from order type Journal to order type Sales order.

Sales order BBE-SO-00364 Credit limit exceeded Open balance: 71.804,92 Current order: 20.508,12 New balance: 92.313,04 Credit limit: 10.000,00 Credit excess: 82.313,04

Sales order

**BBE-SO-00364 : CEBECO AGROCHEMIE BV**

General

**SALES ORDER**

Sales order BBE-SO-00364

Source

Order type Sales order

Continuity order No

Retail sale No

Customer name CEBECO AGROCHEMIE BV

**CUSTOMER**

Customer account BBE-C0006

One-time customer No

**E-COMMERCE**

E-Commerce sales No

GSTIN of the E-Commerce opera...

**INVOICE ACCOUNT**

Invoice account BBE-C0006

Contact

**CONTACT INFORMATION**

Internet address invoices@cebecoagrochemie...

Email hoeven@cebecoagrochemie.nl

**STATUS**

Status Open order

Deadline

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.

Filter

Level

Header

Header

Line

## 1.3 Retribution charges

1. Go to Accounts receivable > Charges setup Retribution charge