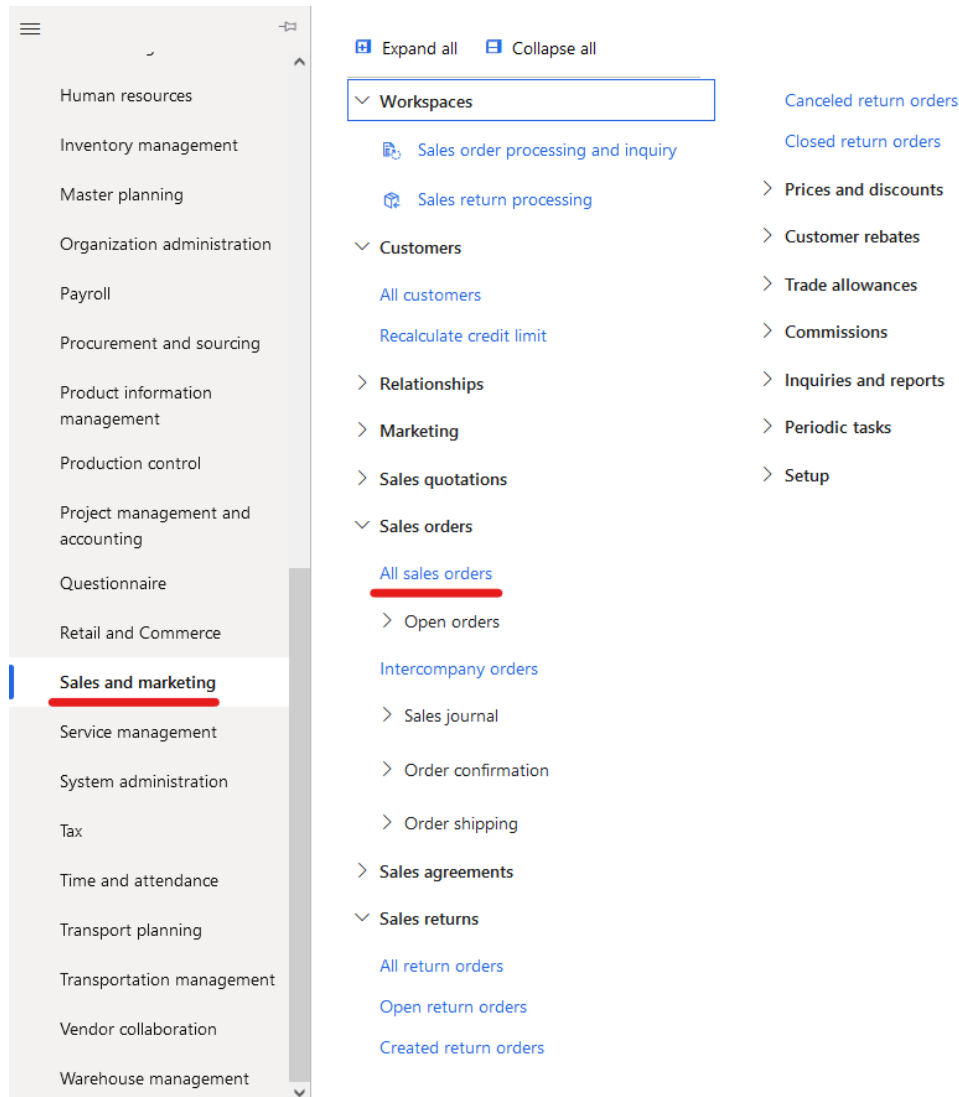
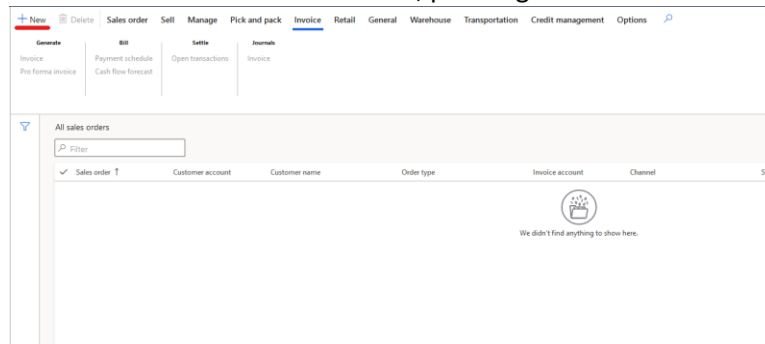


Direct delivery

1. Open “Sales Orders” list selecting **Modules => Sales and marketing => Sales orders => All sales orders**



2. Create a new standard sales order, pressing **New** button



3. This will open prompt “**Create sales order**”, here select the desired Customer account and press OK

Create sales order ?

Customer

CUSTOMER

Customer account
BFR-C0048

One-time customer
☐ No

Search by
Keyword

Search for

Name
UNION INVIVO

Contact

E-Commerce sales
☐ No

ADDRESS

Delivery name
UNION INVIVO

Address
83, Av. De La Grande Armée
75782 PARIS CEDEX
France

Delivery address
UNION INVIVO

General BFR-SO-00099

SALES ORDER CURRENCY

OK Cancel

4. Addition: change **warehouse** on the sales order header to the desired warehouse you want to post the transactions on (receipt and shipment will be done on the same moment).
For French Sales Branch, this warehouse will be "**Client**".
5. In the sales order form add the desired sales order lines, selecting **Item number**. Eventually adjust quantity and price. Then change **Order type** from *Journal* to *Sales order* and save it

Finance and Operations Search for a page

Save + New Delete Sales order Sell Manage Pick and pack Invoice Retail General Warehouse Transportation Credit management Options

Generate Invoice Pro forma invoice Bill Payment schedule Cash flow forecasts Settle Open transactions Correction Credit invoicing Journals Invoice

Sales order BFR-SO-00113 : UNION INVIVO Lines Header Open order

Sales order header

DELIVERY ADDRESS
Name: UNION INVIVO
Delivery address: UNION INVIVO
Address: 83, Av. De La Grande Armée
75762 PARIS CEDEX
France

DELIVERY DATE
Requested ship date: 22/10/2021
Requested receipt date: 22/10/2021
[Simulate delivery dates](#)

Confirmed ship date
Confirmed receipt date

DISCOUNTS
Total discount %: 0.00

WAREHOUSE
Release status: Open

TRANSPORTATION
Routes

DISTRIBUTED ORDER MANAGEMENT
DOM Status: Not processed
Order type: Journal
Subscription
Sales order
Returned order
Item requirements

REFERENCES
Customer reference
Customer requisition

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse Retail

T...	Variant number	Product number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit
	VAR000255	10025:FIDOX 800:FR:4 x 5 LT	10025-02	ROXY 800 EC 4 x 5 LT / FIDOX 8...				800,00	LT

6. When ready confirm the sales order by selecting **Sell => Generate => Confirm sales order**

Save + New Delete Sales order Sell 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 Quotation confirmation Prepayment

Sales order BFR-SO-00113 : UNION INVIVO

Sales order header

DELIVERY ADDRESS
Name: UNION INVIVO

DELIVERY DATE
Requested ship date: 22/10/2021

Confirmed ship date
Confirmed receipt date

DISCOUNTS
Total discount %: 0.00

DISTRIBUT
DOM Status: Not proci

7. This will open prompt **Confirm sales order**. Just press **OK** and confirm.

Confirm sales order

Arrange Select Printer setup

Parameters

PARAMETER
Quantity: All
Posting: Yes
Late selection: No

PRINT OPTIONS
Print: Current
Print confirmation: No
Use print management destination: No
Print COD: No
Print shipping labels: No

SETUP
Check credit limit: Balance + All
Deadline
Summary update for: None

Overview

Update	Customer packing slip number	Sales order	Name	Currency
Confirmation		BFR-SO-00099	UNION INVIVO	EUR

Setup

OK Cancel Batch

8. Next step after order confirmation is the creation of the **Direct delivery** order. Go to **Sales order => New => Direct delivery**

Save + New Delete Sales order Sell Manage Pick and pack Invoice Retail General Warehouse Transportation Credit management Options

New Maintain Payments Copy View Functions Attachments Email notification

Service order Cancel Payments From all Totals Transport order Order credit Notes Email notification log

Purchase order From journal Order events Transport requirement Sales order recap Document notes

Direct delivery Detailed status Order holds

Sales order

BFR-SO-00113 : UNION INVIVO

Sales order header

DELIVERY ADDRESS

Name UNION INVIVO

Delivery address UNION INVIVO

Address 83, Av. De La Grande Armée
75782 PARIS CEDEX
France

DELIVERY DATE

Requested ship date 22/10/2021

Requested receipt date 22/10/2021

Confirmed ship date

Confirmed receipt date

DISCOUNTS

Total discount % 0.00

WAREHOUSE

Release status Open

TRANSPORTATION

Routes

REFERENCES

Customer reference

Customer requisition

DISTRIBUTED ORDER MAN

DOM Status Not processed

Order type Sales order

Simulate delivery dates

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse Retail

9. This will open prompt **"Create direct delivery"**. Here you turn **Include all** to **Yes**, since normally we create order containing only product for direct delivery, and **Search for purchase agreement** to **Yes**. After that just press **OK**.

Create direct delivery

Include all Yes

Adjust quantity to within permitted r... No

Transfer delivery address Yes

Search for purchase agreements Yes

Lines

Inventory

Filter

Include	Vendor account	Item number	CW quantity	CW unit	Quantity	Unit	Unit	Currency	Purchase unit p...	Net amount	Net amount co...	Sales order 1
<input checked="" type="checkbox"/>	BFR-V0004	10025-02			800.00	LT	LT	EUR	99.99	79.992.00	79.992.00	BFR-SO-00113

Line details

DISCOUNT

Discount percentage 0.00

Cash discount amount 0.00

Multiline discount 0.00

Multiline discount percentage 0.00

PRICES

Price unit 1.00

Charges on purchases 0.00

OK Cancel Validate

10. This will trigger the generation of a purchase order, which is not managed by *Customer service*, but by *Supply chain*
11. By selecting **General => Related information => Purchase order**, you should be able to visualize the related **purchase order**

Save + New Delete Sales order Sell Manage Pick and pack Invoice Retail **General** Warehouse Transportation Credit management Options

Set up Print management Summary Customer Trade agreements Activities Cases Maintain Supplementary sales items Related information Purchase order committed costs Attached sales agreement

Operation completed Automatic purchase creation Vendor account: BFR-V0004 Purchase order BFR-PO-00148 has been created.

Sales order BFR-SO-00113 : UNION INVIVO Lines Header Open

Sales order header

DELIVERY ADDRESS Name: UNION INVIVO Delivery address: UNION INVIVO Address: 83, Av. De La Grande Armée 75782 PARIS CEDEX France

DELIVERY DATE Requested ship date: 22/10/2021 Requested receipt date: 22/10/2021 Simulate delivery dates

Confirmed ship date: Confirmed receipt date:

DISCOUNTS Total discount %: 0.00

DISTRIBUTED ORDER MANAGEMENT DOM Status: Not processed Order type: Sales order

WAREHOUSE Release status: Open

TRANSPORTATION Routes:

REFERENCES Customer reference: Customer requisition:

Purchase order:

Edit + New Delete Workflow Purchase order **Purchase** Manage Receive Invoice Retail Warehouse Transportation General Options

Create Credit note Charges Maintain charges Allocate charges Tax Sales tax Calculate Multiline discount Total discount Supplementary items Prepayment Remove prepayment Purchase inquiry Confirmation Pro forma confirmation Confirm Invoice Transport requirement Distribute amounts View distributions Purchase inquiry Purchase order confirmations Purchase orders sent for confirmation Send for confirmation Purchase orders sent for confirmation View response on latest sent order Purchase order vendor confirmation history

Purchase order BFR-PO-00148 : BFR-V0004 - GLOBACHEM N.V. Lines Header Open order Approved

Purchase order header

DELIVERY Local date: Delivery date: 22/10/2021 Earliest confirmed delivery:

DISCOUNTS Total discount %: 0.00

REPLENISHMENT Service category: Location:

CROSS DOCKING DATES Delivery date: 22/10/2021 Cross docking date:

Local delivery date: Sales date:

PRODUCT/ORDER CREATION Auto created: No Origin: Purchase

Purchase order lines

+ Add line Add lines Add products Remove Purchase order line Financials Inventory Product and supply Update line Warehouse

Item number	Product name	Procurement category	Variant number	CW quantity	CW unit	Quantity	Unit
1	10025FIDOX 800FR4 x 5 LT	10025-02	ROXY 800 EC 4 x 5 LT / FIDOX 8...	VAR000255		800.00	LT

The purchase order contains prices defined in **purchase agreement**:

Purchase order lines

+ Add line Add lines Add products Remove Purchase order line Financials Inventory Product and supply Update line Warehouse

Item number	Product name	Procurement category	Variant number	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted unit pr...	Discount	Discount percent	N...
10025-02	ROXY 800 EC 4 x 5 LT / FIDOX 8...		VAR000255			800.00	LT	99.99	0.00000			7

12. When Supply chain complete the Purchase order process the original sales order assume status **Delivered**

All sales orders

Filter

Sales order	Customer account	Customer name	Order type	Invoice account	Channel	Status	Release status
BFR-SO-00076	BFR-C0103	CA DE MATHA	Sales order	BFR-C0103		Open order	Open
BFR-SO-00077	BFR-IC-C0001	BELCHIM CROP PROTECTION NV	Sales order	BFR-IC-C0001		Open order	Open
BFR-SO-00078	BFR-C0097	AGROSUD / JEEM	Sales order	BFR-C0097		Invoiced	Open
BFR-SO-00079	BFR-IC-C0001	BELCHIM CROP PROTECTION NV	Sales order	BFR-IC-C0001		Open order	Open
BFR-SO-00085	BFR-C0118	DHA SAC	Sales order	BFR-C0118		Invoiced	Open
BFR-SO-00086	BFR-C0118	DHA SAC	Returned order	BFR-C0118		Invoiced	Open
BFR-SO-00088	BFR-C0118	DHA SAC	Sales order	BFR-C0118		Invoiced	Open
BFR-SO-00093	BFR-C0057	GRITCHE ETS	Sales order	BFR-C0057		Invoiced	Open
BFR-SO-00097	BFR-C0030	GEPS SARL	Sales order	BFR-C0030		Invoiced	Open
BFR-SO-00099	BFR-C0048	UNION INVIVO	Sales order	BFR-C0048		Invoiced	Open
BFR-SO-00102	BFR-C0090	AGRIHUB SAS	Sales order	BFR-C0090		Open order	Open
BFR-SO-00105	BFR-C0003	AGRIA sa (UI)	Sales order	BFR-C0048		Open order	Open
BFR-SO-00106	BFR-C0011	AGROSUD / TOUCHAT	Sales order	BFR-C0011		Invoiced	Open
BFR-SO-00107	BFR-C0017	BRUYAGRI SA	Sales order	BFR-C0017		Invoiced	Open
BFR-SO-00109	BFR-C0049	VERTUMNE ETS	Sales order	BFR-C0049		Open order	Open
BFR-SO-00111	BFR-C0118	DHA SAC	Sales order	BFR-C0118		Invoiced	Open
BFR-SO-00112	BFR-C0118	DHA SAC	Returned order	BFR-C0118		Invoiced	Open
BFR-SO-00113	BFR-C0048	UNION INVIVO	Sales order	BFR-C0048		Delivered	Open

13. When opening the order all “pick & pack” operations are not available, since they have been covered by purchase order process

Finance and Operations Search for a page

Edit + New Delete Sales order Sell Manage **Pick and pack** Invoice Retail General Warehouse Transportation Credit management Op

Generate
Generate picking list Post packing slip
Picking list registration Pro forma packing slip
Intercompany picking list **Transport requirement**

Delivery
Transportation details

Journals
Picking list
Packing slip

Sales order details
BFR-SO-00113 : UNION INVIVO

Sales order header

DELIVERY ADDRESS	DELIVERY DATE	Confirmed ship date	DISCOUNTS
Name	Requested ship date		Total discount %
UNION INVIVO	22/10/2021		0,00
Delivery address	Requested receipt date	Confirmed receipt date	
UNION INVIVO	22/10/2021		
Address	Simulate delivery dates	REFERENCES	WAREHOUSE
83, Av. De La Grande Armée		Customer reference	Release status
75782 PARIS CEDEX		Customer requisition	Open
France			TRANSPORTATION
			Routes

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse

✓	T...	Variant number	Product number	Item number	Product name	Sales category
---	------	----------------	----------------	-------------	--------------	----------------

14. As last step is now possible to invoice the order as usual, by selecting **Invoice => Generate => Invoice**

Edit + New Delete Sales order Sell Manage **Pick and pack** **Invoice** Retail General Warehouse Transportation Credit management Options

Generate
Invoice Pro forma invoice
Bill
Payment schedule
Cash flow forecasts
Settle
Open transactions
Correction
Credit invoicing
Journals
Invoice

Sales order details
BFR-SO-00113 : UNION INVIVO Lines Header D

Sales order header

DELIVERY ADDRESS	DELIVERY DATE	Confirmed ship date	DISCOUNTS	DISTRIBUTED ORDER MANAGEMENT
Name	Requested ship date		Total discount %	DOM Status
UNION INVIVO	22/10/2021		0,00	Not processed
Delivery address	Requested receipt date	Confirmed receipt date		Order type
UNION INVIVO	22/10/2021			Sales order
Address	Simulate delivery dates	REFERENCES	WAREHOUSE	
83, Av. De La Grande Armée		Customer reference	Release status	
75782 PARIS CEDEX		Customer requisition	Open	
France			TRANSPORTATION	
			Routes	

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse Retail

15. This open prompt “**Posting invoice**” where you just press OK, selecting **Packing slip** as **Quantity** value

Posting invoice

Arrange Select Printer setup

Parameters

PARAMETER

Quantity
Packing slip

Posting

Yes

Late selection

No

Reduce quantity

No

ASSOCIATED PAYMENT ATTACHMENT

Associated payment attachment on cus...

None

COMPLIANCE DOCUMENTS

Prevent sales pack slip/invoice posting

No

Print product safety data sheet

No

PRINT OPTIONS

Print

Current

Print invoice

No

Use print management destination

No

Print COD

No

Print shipping labels

No

Print charges

Show details

SETUP

Check credit limit

Balance + All

Credit correction

Yes

Credit remaining quantity

No

SUMMARY ORDER

Summary update for

None

Overview

+ Add Remove Tracking information Select packing slip Totals Sales tax Payment schedule Transportation details

✓	Packing slip	Update	Customer packing slip number	Sales order	Site	Name	Currency	Print lump sum ...
	BFR-PAS-002 ...	Invoice		BFR-SO-00113	OP	UNION INVIVO	EUR	✓

OK Cancel Batch