



Sales branch work instructions

Happy flow

Sales order creation

1. Work instructions

1.2. Sales Order Management

1.2.1. All Orders

1.2.1.1. Create New Sales Order Happy Flow

Purpose of this document is to give a quick overview of the mandatory entries for entering a sales order including picking list, batch registration and packing slip posting. For a detailed explanation of the sales order creation please see the related work instruction.

1. Create a new sales order
Go to Modules - Accounts receivables – Sales Orders - All Sales order
Select “+New”
Search for customer, enter customer account number...
Enter request and shipping date
Select sales order type
Check for correct delivery address and contact person
Enter Customer reference / requisition if applicable
Click “ok”
2. Add items via item code, item name or else
Enter Quantity
Check prices, warehouse and possible discounts on line level
Click “Sales order” – “View” – “Totals” to check the total value of the sales order
Click “Add line” to add another item or click “add items” to add several items
Select an item line and click on “on-hand inventory” to check available inventory in the selected warehouse
3. To add a note to the sales order click on the paper clip in the upper right corner and add the correct note.
4. Sales Order confirmation
After entering all ordered items click on “Sell” – “confirm sales order” to print and send a sales order confirmation
Click on Sell – Journals – Sales order confirmation to check the created sales order confirmations and to follow up changes
5. Generate picking list
“Pick and pack” – “Generate picking list”
Select the orders which should be handled.
Check correct quantity on item line level and click ok to generate and print picking list
To check the packing slip go to “Pick and pack” – “Journals” – “Picking list”
6. Picking list registration
“Pick and pack” – “Picking list registration”
Check delivered quantity on line level. If more than one batch needs to be registered click on “functions” – “Split” and enter the correct quantity split
Enter Location (“Default”) and batch per picking list line
Click “Functions” – “Update Line” on line level or “Update” – “Update all” to update the lines with the entered locations and batches. Handling status of line will change to “Completed” after updating. Handling status of the whole picking route will be changed to “Completed” after updating all picked lines.
Close window after updating
7. Post packing slip
“Pick and pack” – “Post packing slip”
Check picked quantity on line level
Click “OK” if all data is correct to generate and print packing slip
To check the packing slip go to “Pick and pack” – “Journals” – “Packing slip”