

# Milestone 6: Sales:

## Activity 1: Sales Order Creation:

The screenshot shows the 'New Sales Order' form in the Books application. The form is divided into several sections: Customer Information, Sales Order Details, Item Details, and Totals. The Customer Information section includes fields for Customer Name, Sales Order Number, Reference, Sales Order Date, Expected Shipment Date, Payment Terms, and Delivery Method. The Item Details section includes a table for Item Details with columns for Item, Quantity, Rate, Discount, and Tax. The Totals section includes fields for Sub Total, Adjustment, and Total. The form also includes a section for Customer Notes and Terms & Conditions.

**Customer Name\***  
Select or add a customer

**Sales Order#\***  
SO-00003

**Reference#**

**Sales Order Date\***  
17/06/2023  
To create transaction dated before 01/07/2017, click here

**Expected Shipment Date**  
dd/MM/yyyy

**Payment Terms**  
Due on Receipt

**Delivery Method**  
Select a delivery method or type to add

**Salesperson**  
Select or Add Salesperson

**ITEM DETAILS**

ITEM DETAILS	QUANTITY	RATE	DISCOUNT	TAX
Type or click to select an item.	1.00	0.00	0 %	Select a Tax

**Sub Total** 0.00

**Adjustment** 0.00

**Total (₹)** 0.00

**Customer Notes**  
Enter any notes to be displayed in your transaction

**Terms & Conditions**  
Enter the terms and conditions of your business to be displayed in your transaction

**Attach Field to Sales Order**  
Upload File

## Activity 2: Sales Order to Sale Invoice Conversion:

The screenshot shows the 'All Sales Orders' table in the Books application. The table has columns for Date, Sales Order Number, Reference, Customer Name, and Status. There are two rows of data.

DATE	SALES ORDER#	REFERENCE	CUSTOMER NAME	STATUS
20/04/2023	SO-00002		Ms.Priya Ranganathan	CLOSED
10/04/2023	SO-00001		Mr.suresh Kumar Iyer	CLOSED

## Activity 3: Direct Sale Invoices:

**New Invoice**

Customer Name\*  
Select or add a customer

Invoice#\*  
INV-000006

Order Number

Invoice Date\*  
17/10/2023  
To create transaction dated before 01/09/2017, click here

Terms  
Due on Receipt  
Due Date  
17/10/2023

Salesperson  
Select or Add Salesperson

Subject  
Let your customer know what this Invoice is for

[Bulk Update Line Items](#)

ITEM DETAILS	QUANTITY	RATE	DISCOUNT	TAX
Type or click to select an item	1.00	0.00	0	%

[Add another line](#)

Customer Notes  
Thanks for your business.

Will be displayed on the invoice

Sub Total 0.00

TDS ☐ TCS ☐ Select a Tax - 0.00

Adjustment 0.00

Total ( ₹ ) 0.00

Terms & Conditions  
Enter the terms and conditions of your business to be displayed in your transaction

Save as Draft Save and Settle Cancel

## Activity 4: Receive Payment:

Click on the Record Payment and enter the Amount received to mark the invoice paid:

## Activity 5: Reconciliation of Open Invoices:

**All Invoices**

DATE	INVOICE#	ORDER INVOICE#	CUSTOMER	STATUS	DUE DATE	AMOUNT	BALANCE
15/04/2023	INV-000005		Mr. Karthik Krishnan	OVERDUE BY 185 DAYS	15/04/2023	₹21,000.00	₹12,600.00
20/04/2023	INV-000004		Ms. Kavitha Rajendran	PAYD	10/10/2023	₹6,300.00	₹0.00
20/04/2023	INV-000003		Mr. Aravind an Merti	PAYD	10/10/2023	₹5,250.00	₹0.00
20/04/2023	INV-000002	SO-00002	Ms. Priya Rangarath an	OVERDUE BY 7 DAYS	10/10/2023	₹42,000.00	₹42,000.00
10/04/2023	INV-000001	SO-00001	Mr. Suresh Kumar Iyer	OVERDUE BY 7 DAYS	10/10/2023	₹1,05,000.00	₹1,05,000.00