

Milestone 6: Sales  
Activity 1: Sales Order Creation

10:59

books.zehe.in/app/60023649

3

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Search in Sales Order

You are currently logged in as

Dream Horizons Realty

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Time Tracking

in-Play Bills

GST Filing

Accountant

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New Sales Order

Customer Name\*

Select or add a customer

Sales Order#

SO-00003

Reference#

Sales Order Date\*

16/10/2023

To create transaction dated before 06/03/2027, click here

Expected Shipment Date

ddMM/yyyy

Payment Terms

Due on Receipt

Delivery Method

Select a delivery method or +

Salesperson

Select or Add Salesperson

ITEM DETAILS

QUANTITY

RATE

DISCOUNT

TAX

Type or click to select an item

1.00

0.00

0

%

Select a Tax

Add another line

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 Photo to Sales Order

Upload File

You can upload a maximum of 10 files, 10MB each

Additional Fields: Add custom fields to your sales orders by going to Settings → Sales → Sales orders → Field Customization

Save as Draft

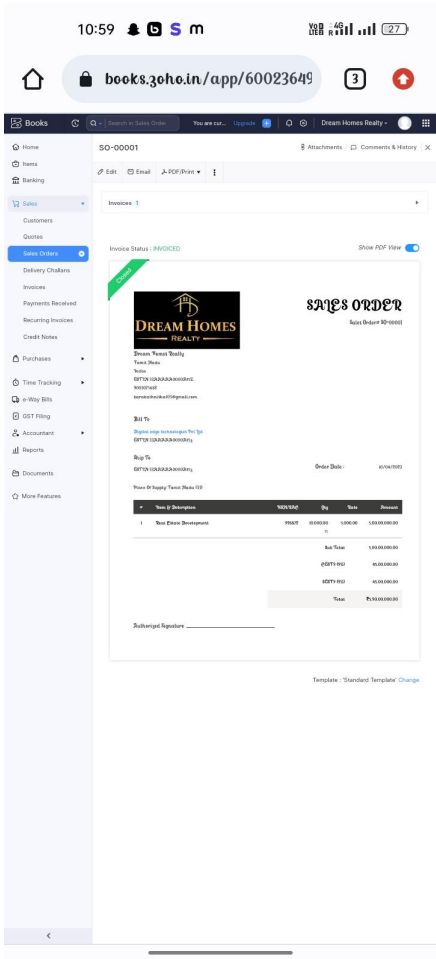
Save and Send

Cancel

Total Amount ₹ 0.00

Total Quantity 0

Activity 2: Sales Order to Sale Invoice conversion



Activity 3: Direct Sale Invoices

11:01

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+

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New Invoice

Customer Name\*

Select or add a customer

Invoice#\*

INV-000003

Order Number

Invoice Date\*

16/10/2023

Terms

Due on...

Due Date

16/10/2023

Salesperson

Select or Add Salesperson

Subject

Let your customer know what this invoice is for

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

TDS

TC

Select a...

- 0.00

Adjustment

0.00

Total ( ₹ )

0.00

Customer Notes

Thanks for your business.

Will be displayed on the invoice

Terms & Conditions

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

Attach File(s) to Invoice

Upload File

You can upload a maximum of 10 files, 10MB each

Want to get paid faster?

Set up Payment Gateway

Additional Fields: Start adding custom fields for your invoices by going to Settings > Sales > Invoices.

Save as Draft

Save and Send

Cancel

Wave questions? Ask away!

## Activity 4: Reconciliation of Open Invoices

