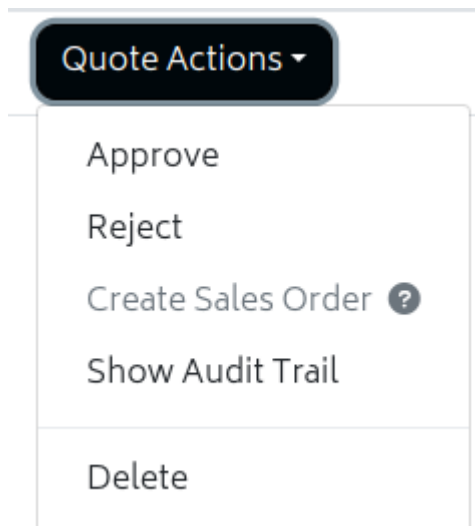


Knowledge Base



Introduction to Sales Orders

In the Quote Actions list, you have the option of creating a Sales order.



Note: If the document is not approved, you will not be able to generate a Sales Order.

The sales order is intended to be used for internal purposes when preparing the job so that your workers know what has been approved by the customer. It uses a separate Xero style, and is intended to be a way to give them this info while removing all financial information or extraneous info.

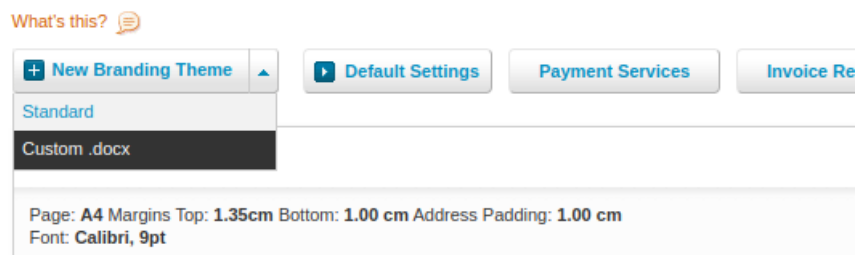
Setting up the Sales Order style

Xero doesn't provide a style that works with sales orders by default. Internally, sales orders use the "Draft Invoice" style Xero provides. In order to make it work properly, you will need to set up a custom .docx style that works with sales orders. For more information on customising Xero Branding Themes, refer to [Xero Central's article](#).

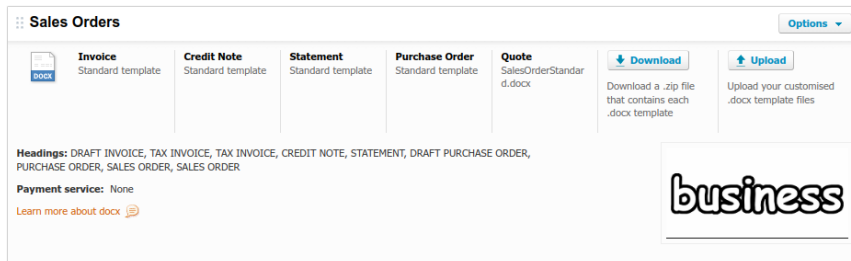
If you are already using .docx Xero branding themes, you can modify your Invoice template and save it as a new theme. Otherwise, a sales order theme template is provided by us here: [Sales Order Xero Theme](#)

To set it up easily, do the following:

- Go to Xero's [Invoice Settings](#) page.
- Create a new .docx theme.



- Either download the sales order theme .docx we have provided above, modify your own org's Invoice .docx theme, or download the .zip of templates and create your own.
- Upload your .docx file under the **Quote** heading in the new theme.



- Make sure to edit the theme and change the Draft Invoice heading to SALES ORDER (or whatever you like).

Edit Branding Theme

×

Name
Sales Orders

Draft Invoice title
DRAFT INVOICE

Approved Invoice title
TAX INVOICE

Overdue Invoice title
TAX INVOICE

Credit Note title
CREDIT NOTE

Statement title
STATEMENT

Draft Purchase Order title
DRAFT PURCHASE ORDER

Purchase Order title
PURCHASE ORDER

Draft Quote title
SALES ORDER

Quote title
SALES ORDER

For titles to appear on the document, the .docx template must contain the <<InvoiceTitle>> mail merge field.

Payment Services (Credit Card)

Payment Services (PayPal)

Payment Services (Bank Payments)

For payment links to appear on invoices, the .docx template file needs to include <<PaymentImage>> and <<PaymentMessageAndUrl>> merge fields.

OK

Cancel

- Go to My Account and use Sync Xero Now to sync Xero organisation settings. You may have to wait for a while until the sync completes.

My Account

Active Organisation: **Demo Company (AU)**

Role: Organisation Owner

[Link a new Xero Organisation](#)

[Organisation Settings](#)

Xero Connections

[Sync Xero Now](#)

[Manage Subscription](#)

[Disconnect from Xero](#)

Linked Organisations

| Organisation | Link Type | Status | Active Roles | Actions |
|--|--------------------|--------|---------------|------------------------|
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Very Real Legit Business Venture Inc. Ltd. | Organisation Owner | Active | Administrator | Switch |

- Go to Organisation Settings > Branding Theme Mapping and choose the new Sales Order theme for sales orders, then save.

Edit organisation Demo Company (AU)

[GL Account Mapping](#)
[Branding Theme Mapping](#)
[Planning](#)
[Email Settings](#)

[Organisation Add-ons](#)
[Job Task Activities](#)
[Payments](#)
[Resource Settings](#)
[Other Settings](#)

Branding Themes

[Open Settings in Xero](#)

Fixed Price Quotes

Standard

Fixed Price Invoices

Standard

Time & Materials Quotes

Standard

Time & Materials Invoices

Standard

Purchase Orders

Standard

Sales Orders

Sales Order Theme

Cool Branding Theme

Sales Order Theme

Special Projects


[Save Changes](#)

Creating the Sales Order



In order to create the sales order for a job, follow these steps:

- Approve the quote/estimate.

- Click on the Create Sales Order option in the Quote Actions menu.

| Status | Sent | | |
|----------|------|--|------------------------|
| Approved | Yes |  Sales Order | Quote Actions ▾ |
| Open | | Please make sure the sales order branding theme is set up in the organisation settings first. Sales orders are for distribution to people who don't need to see the financial information on a quote, such as employees who will be picking the items. | |
| Open | No | | Recreate Sales Order ? |
| Open | No | | Show Audit Trail |
| Open | No | | Delete |

- A PDF document will be created and load in a new tab. It will be a copy of the approved quote with the Sales Order branding theme applied.
 - The choice of branding theme allows the removal of the financial information from the quote.

| 1 / 1 — 100% +   | |
|--|----------|
| <div> <div> <h2>SALES ORDER</h2> <p>City Limousines 13 Waverly Park Rd MELBOURNE VIC 3313</p> </div> <div> <p>Invoice Date 4/17/2024 12:00:00 AM</p> <p>Account Number</p> <p>Invoice Number ORC1056</p> <p>Reference J00001</p> </div> <div> <p>Demo Company (AU) 2024/4/10 23 Main Street MARINEVILLE NSW 2000</p> </div> </div> | |
| Description | Quantity |
| General quote amount | 1.0000 |
| --- Additional Items --- | |
| Screwdriver Set | 1.0000 |
| 4 Pack Downlights | 1.0000 |
| - Arlec 9W Tri Colour Dimmable LED Downlights (Qty 4) | |
| Electrician | 1.5000 |
| Work Van | 0.7500 |
| Very Hard Thinking | 1.0000 |
| Ceiling Fan | 1.0000 |
| Due Date: 4/17/2024 12:00:00 AM | |

- If you navigate back to the job quote/estimate list page, you'll also see a link to the PDF you can access at any time.

Sent

| | | |
|-----|---|-----------------------|
| Yes |  Sales Order | Quote |
| No | | Quote |
| No | | Quote |
| No | | Quote |
| No | | Quote |
| No |  Sales Order | Quote |
| No |  Sales Order | Quote |

Note: While it's possible to un-approve a quote and generate a sales order for a different quote, only the sales order tied to the approved quote will appear from the Job Actions list. Just as there can only be one approved quote at a time, there should be only one sales order. You can still be able to see previous sales orders from the Quotes/Estimates list for the job.

The PDF will also be accessible from the Job Actions breadcrumb.



Jobs > Job J00001 > Edit Job ▾

Edit Customer

[Job Settings](#)

General

Reference Num

[Edit Job](#)
[Prepayments](#)
[Quotes](#)
[Schedule](#)
[Invoices](#)
[Record Consumables](#)
[Reservations](#)
[Purchasing](#)
[Review Job](#)
[Delivery Dockets](#)
[Cost Adjustments](#)
 [Sales Order](#) 

Next: [Back to Knowledge Base.](#)