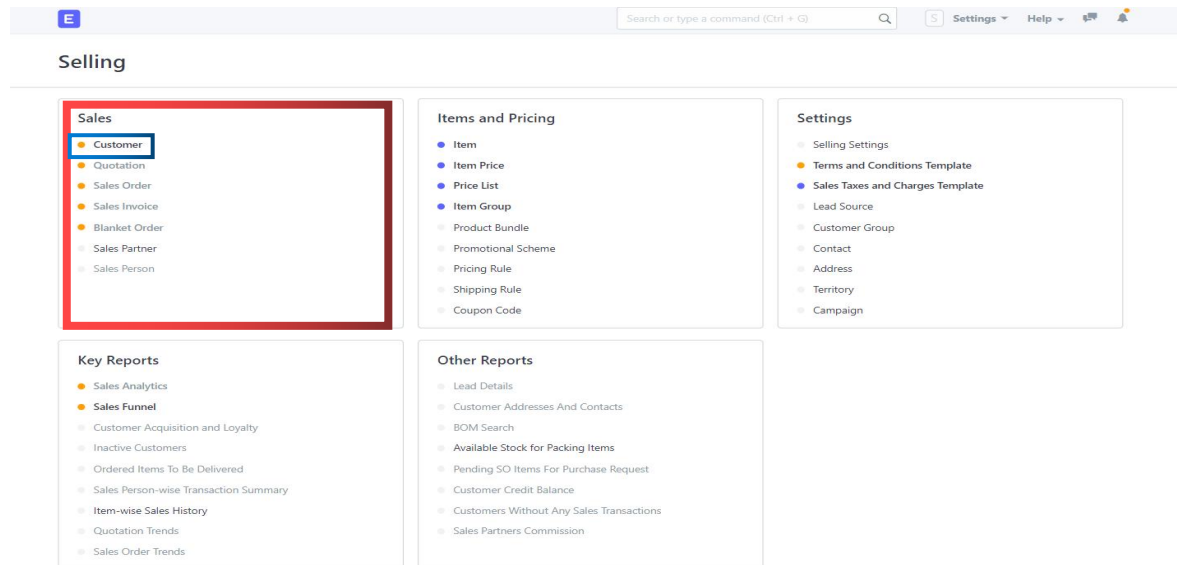


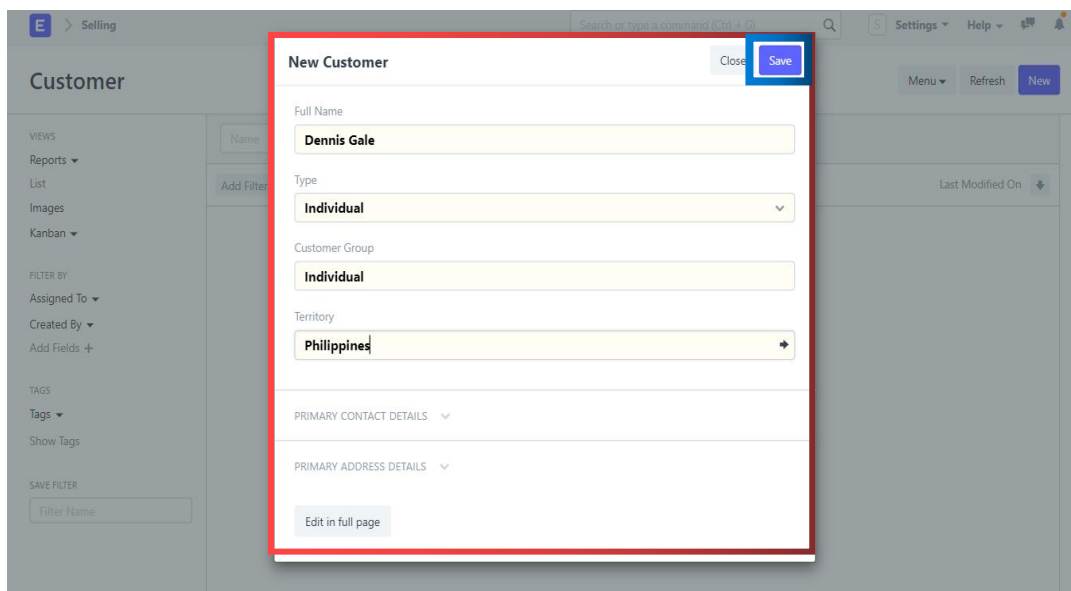
SELLING

1. First Create a Customer Go to Home Desk and Click Selling . My Demo is I'm creating an individual type of customer who wants to buy a T-shirt .

➤ Go To Selling in "Sales" section you can see customer then click it



2. Click the Create a New Customer and Fill the Information of the person after you fill everything click "Save"



3. If the customer is a walk in you can skip the Quotation part and proceed to Sales Order. So Dennis Gale Wants to order White T-shirt and the code is "RJR-00010".

- Go to Selling in "Sales" section Find "Sales Order" and click it.
- Click Create a New Sales Order
- Enter the Name of the Customer
- Fill The item of the customer he/she wants to buy in the item code column.
- Enter the Delivery Date what date will it be deliver
- Enter the Quantity of T-shirt the customer wants to buy and how much will you rate the T-shirt. It will automatically calculated the quantity multiplied by the Rate.
- Lastly Click " Save" after filling in and Submit.

Search or type a command (Ctrl + G)

S Settings Help

New Sales Order 1 • Not Saved

Save

Get items from

Series: SAL-ORD-.YYYY.- Date: 06-15-2022

Customer: Dennis Gale Delivery Date:

Order Type: Sales Customer's Purchase Order:

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Set Source Warehouse

Item Code	Delivery Date	Quantity	Rate	Amount
1 RJR-00010	06-16-2022	4.000	150.00	600.00

Add Multiple Add Row Download Upload

4. After Processing Sales Order Lets go to "Delivery Note". Click Create and Find Delivery Note then Click it.

Search or type a command (Ctrl + G)

S Settings Help

Dennis Gale • To Deliver and Bill

SAL-ORD-2022-00001 Menu Cancel

Update Items Status Create

Pick List

Delivery Note

Work Order

Sales Invoice

Material Request

Request for Raw Materials

Purchase Order

Project

Subscription

Payment Request

Payment

Comments: 0

Assigned To: Assign

Attachments: Attach File

Tags: Add a tag...

Reviews: +

Shared With: +

You edited this 19 minutes ago

You created this 19 minutes ago

DASHBOARD

Customer: Dennis Gale Date: 06-15-2022

Order Type: Sales Delivery Date: 06-16-2022

Customer's Purchase Order:

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Item Code	Delivery Date	Quantity	Rate
1 RJR-00010: Plain White T-Shirt	06-16-2022	4	150.00

Total Quantity: 4 Total Net Weight: 0

5. Automatically it fills the information fetched in sales order

- Set The Source Warehouse
- Click Save and Submit

E > Stock > Delivery Note

Search or type a command (Ctrl + G)

S Settings Help

New Delivery Note 1 • Not Saved

Save

DELIVERY TO

Series: MAT-DN-YYYY- Date: 06-15-2022

Customer: Dennis Gale Posting Time: 15:41:54.481938

☐ Edit Posting Date and Time

☐ Is Return

CUSTOMER PO DETAILS

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Currency: PHP Price List: Standard Selling

☒ Ignore Pricing Rule

Set Source Warehouse: 1st Branch Stores (Cebu) - VMM To Warehouse: Required only for sample item.

Items

	Item Code	Quantity	UOM	Rate	Amount	
<input type="checkbox"/>	1 RJR-00010: Plain ...	4	Nos	₱ 150.00	₱ 600.00	

Add Multiple Add Row Download Upload

6. In Delivery Note of the customer click "Create" and find "Sales Invoice"

E > Stock > Delivery Note

Search or type a command (Ctrl + G)

S Settings Help

Dennis Gale • To Bill

MAT-DN-2022-00001 Menu Cancel

Create

View Status

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Dashboard

DELIVERY TO

Customer: Dennis Gale Date: 06-15-2022

Posting Time: 15:46:11.960505

☐ Is Return

CUSTOMER PO DETAILS

CURRENCY AND PRICE LIST

Set Source Warehouse: 1st Branch Stores (Cebu) - VMM

Items

	Item Code	Quantity	UOM	Rate	Amount	
<input type="checkbox"/>	1 RJR-00010: Plain ...	4	Nos	₱ 150.00	₱ 600.00	

Total Quantity: 4 Total Net Weight: 0

Total (PHP): ₱ 600.00

7. It will automatically create a new sales invoice. A Sales invoice is a bill that you send to your Customers against which the Customer makes the payment.

- Click “Save” and “Submit”

New Sales Invoice 1 • Not Saved Save

Series: **ACC-SINV-YYYY-** Date: **06-15-2022**

Customer: **Dennis Gale** Posting Time: **15:51:11.497359**

☐ Include Payment (POS) ☐ Edit Posting Date and Time

☐ Is Return (Credit Note) Payment Due Date: **06-15-2022**

ACCOUNTING DIMENSIONS

CUSTOMER PO DETAILS

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

☐ Update Stock

Items

	Item	Quantity	Rate	Amount	
1	RJR-00010: Plain White T-Shirt	4	P 150.00	P 600.00	

[Add Multiple](#) [Add Row](#) [Download](#) [Upload](#)

8. As you can see Dennis Gale is Unpaid so Let's Make the customer's payment entry if he/she already paid his/her order.

- Go to Create
- Find “Payment” and click it.

Dennis Gale - ACC-SINV-2022-00001 x Sales Invoice x Facebook x +

localhost:8080/desk#Form/Sales%20Invoice/ACC-SINV-2022-00001

Accounting > Sales Invoice Search or type a command (Ctrl + G) Settings Help

Dennis Gale • Unpaid ACC-SINV-2022-00001 Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag...

Reviews +

Shared With +

You edited this 20 minutes ago

You created this 20 minutes ago

purchase-receipt-....png

View Create

DASHBOARD

Customer: **Dennis Gale** Date: **06-15-2022**

Posting Time: **15:58:05.124397**

Payment Due Date: **06-15-2022**

☐ Include Payment (POS) ☐ Edit Posting Date and Time

☐ Is Return (Credit Note)

CUSTOMER PO DETAILS

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

☐ Update Stock

Items

Payment

Return / Credit Note

Payment Request

Invoice Discounting

Maintenance Schedule

Subscription

Show all

31°C Light rain 4:18 pm 15/06/2022

9. In the payment entry you can see that the payment type has been receive and automated information being fill

- Fill in the Transaction ID which is the Cheque/ reference No and the Cheque / Reference Date
- Click “Save” and “Submit “

New Payment Entry 1 Not Saved Save

TYPE OF PAYMENT

Series

ACC-PAY-YYYY-

Posting Date

06-15-2022

Payment Type

Receive

Mode of Payment

PAYMENT FROM / TO

Party Type

Customer

Company Bank Account

Party

Dennis Gale

Party Bank Account

Party Name

Dennis Gale

Contact

ACCOUNTS

AMOUNT

Paid Amount (PHP)

600.00

REFERENCE

Get Outstanding Invoice

Payment References

<input type="checkbox"/>	Type	Name	Total Amount	Outstanding	Allocated	
<input type="checkbox"/>	1 Sales Invoice	ACC-SINV-2022-00...	600	600	600	

Add Row

WRITEOFF

Total Allocated Amount (PHP)

P 600.00

Unallocated Amount (PHP)

0.00

Difference Amount (PHP)

P 0.00

DEDUCTIONS OR LOSS

TRANSACTION ID

Cheque/Reference No

5464216

Cheque/Reference Date

06-16-2022

10. Lastly Lets Confirm if the Customers Have Already Completed the Order.

- Go to Selling in the “Sales” section find “Sales Order”
- In the Sales Order you can see that Dennis Gale the customer has already “Completed” the Order Transaction.

E > Selling

Search or type a command (Ctrl + G)

Settings Help

Sales Order

Menu Refresh New

VIEWS

- Reports
- List
- Gantt
- Calendar
- Kanban

FILTER BY

- Assigned To
- Created By
- Add Fields

TAGS

- Tags
- Show Tags

SAVE FILTER

Filter Name

Name Title Customer Vape Music & Merch Date

Add Filter Last Modified On

<input type="checkbox"/>	♥ Title	Status	Delivery Date	Grand Total	% Delivered	% Amount Bill...	1 of 1
<input type="checkbox"/>	♥ Dennis Gale	Completed	06-16-2022	₱ 600.00		AL-ORD-2022-00001 32 m	

E > Selling > Sales Order

Search or type a command (Ctrl + G)

Settings Help

Dennis Gale Completed

SAL-ORD-2022-00001 Menu Cancel

Comments 0 Create

Assigned To Assign

Attachments Attach File

Tags Add a tag

Reviews

Shared With

You edited this 33 minutes ago

You created this 53 minutes ago

DASHBOARD

Customer: **Dennis Gale** Date: **06-15-2022**

Order Type: **Sales** Delivery Date: **06-16-2022**

Customer's Purchase Order

ADDRESS AND CONTACT

CURRENCY AND PRICE LIST

Items

<input type="checkbox"/>	Item Code	Delivery Date	Quantity	Rate	Amount
<input type="checkbox"/>	1 RJR-00010: Plain White T-Shirt	06-16-2022	4	₱ 150.00	₱ 600.00

Total Quantity: **4** Total Net Weight: **0**

Total (PHP): **₱ 600.00**

- Dennis Gale** • Enabled

Accounting Ledger Accounts Receivable Create

DASHBOARD

This is based on transactions against this Customer. See timeline below for details.

Annual Billing: P 600.00

 - Pre Sales
 - Opportunity +
 - Quotation +
 - Payments
 - Payment Entry 1 +
 - Projects
 - Project +
 - Subscriptions
 - Subscription +

Total Unpaid: P 0.00

 - Orders
 - Sales Order 1 +
 - Delivery Note 1 +
 - Sales Invoice 1 +
 - Support
 - Issue +
 - Pricing
 - Pricing Rule +

You edited this
1 hour ago

You created this
1 hour ago

- General Ledger

Menu Refresh

Set Chart

Vape Music & Merch

Finance Book

05-15-2022

06-15-2022

Account

Voucher No

Customer

Dennis Gale

Group by Voucher (Consolidat

Cost Center

Project

☒ Show Opening Entries

☒ Include Default Book Entries

Account	Debit (PHP)	Credit (PHP)	Balance (PHP)	Voucher Type	Voucher No	Against Account	Party Type	Party
Opening	0.000	0.000	0.000					
1310 - Debtors - VMM	600.000	0.000	600.000	Sales Invoice	ACC-SINV-2022-00001	4110 - Sales - VMM	Customer	Dennis Gale
1310 - Debtors - VMM	0.000	600.000	0.000	Payment Entry	ACC-PAY-2022-00003	RJRB - VMM	Customer	Dennis Gale
Total	600.000	600.000	0.000					
Closing (Opening + Total)	600.000	600.000	0.000					

◀

▶

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).

Execution Time: 0.012159 sec