Sales

How to Make a Sales Order

Prerequisite

A Sales Order Station must be created before a Sales Order can be made. See [How Do I Make a Station?]

Where is New Sales Order Located?

- **Sales > Start a Task > New Sales Order**

Why & When a Sales Order is Used

A sales order is used to create a record of what a trading partner wants to buy. Often a sales order is created when an outside company sends a Purchase Order to you wanting to buy your product. Sales orders list inventory, the load, and manage the financial aspect of the order. Sales Orders enable you to sell products or materials and/or relieve inventory.

How to Create a Sales Order

1. **Sales > Start a Task > New Sales Order**
2. Click the dropdown to see a list of Sales Order stations in the Sales Order Station field. Click to select one.
3. Depending on policies, some data may automatically fill.
4. In the **Bill to** field, click the dropdown to select who will pay for the order.
    - Only trading partners that are active with a Bill To address or Billing partner will appear in the list **(Company > Find > Trading Partners > “choose partner” > address)**
5. Depending on your bill to settings, other fields may auto-fill
6. Fill in the **Ship to** field to select the trading partner and address that will receive the product.
7. Fill in any remaining yellow fields including the **Ship On Date**.
8. A load must be selected to move forward. Click the dropdown to select an existing load. If no load exists, click **'+'** to open a Load screen.
    - A policy exists to automatically assign and create a load. The load screen will not open, but the load tab will enable.
9. Once a load is created or selected, **Save.**
10. Add product to the Sales Order. Double click in the large empty grid to add a product line.
    - Click to select between **Product** and **Addon** in the **Type** column
    - Fill in the information as needed. Item, Quantity, and Price are recommended as a minimum. Use Column Chooser to add or remove columns.
11. To select a product, type the desired SKU under the SKU column (this may be added using Column Chooser) OR click under the Item heading to open a dropdown selection menu. Type in the commodity and stage and press TAB to populate the element fields and dropdown list.
    - Click on the correct product or type in the requested element fields

to reduce the list length.

12. Continue adding products and addons as desired.
13. Click **'+'** to see details about associated charges.
14. **Save,** and your Sales Order is now created and in Open status.

Depending on permissions and if the tab is visible, you may also:

- Click the Disbursement tab to review liabilities
- Click the Administration tab to print and preview the Sales Order documents, process credit memos, post to accounting, and other administrative tasks.

Troubleshooting & Tips

- To reorganize the items, click to highlight a line item and then click the green up or down arrow to move them in order of importance on the list.

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