


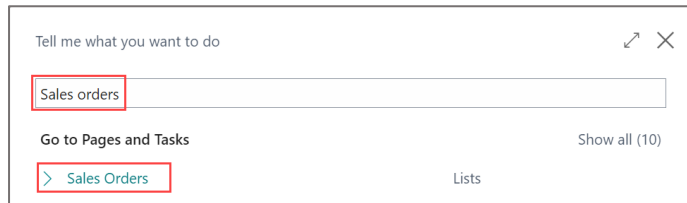
A sales order represents an agreement between the seller and a customer to sell products or services. It facilitates the management of shipments and invoices and the tracking of product deliveries, ensuring accurate accounting for customer invoices related to sales orders.

Assumption/System setup considerations

- Set up customers with relevant posting groups.
- Set up finished goods items and locations.
- Set up sales order numbering.
- Set up sales pricing and discounts.
- Set up item charges or surcharges (e.g., freight) if required.

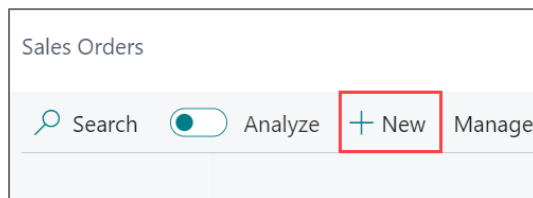
Create a sales order

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.

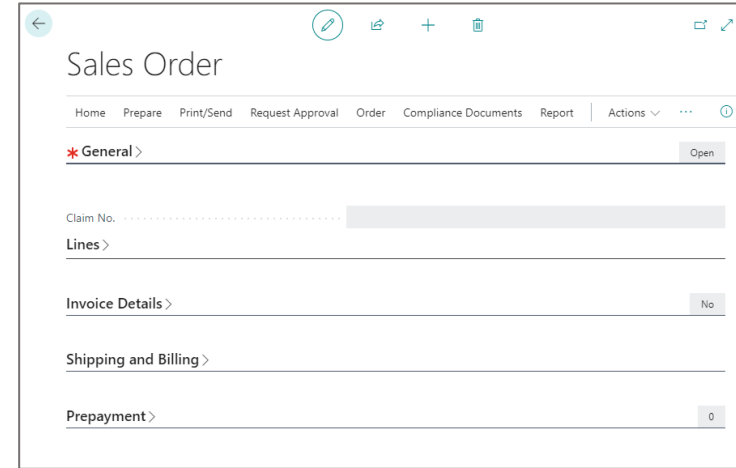


The **Sales Orders** list page opens.

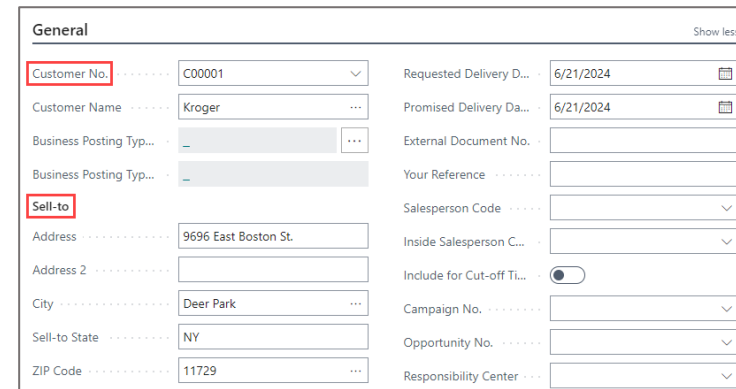
2. On the action bar, select **New**.



The **Sales Order** card page opens.



3. On the **General** FastTab, select a value in the **Customer No.** field and fill in the fields in the **Sell-to** group.



4. On the **Invoice Details** FastTab, enter/select the following fields:
 - **Currency Code** – Select the currency of amounts on the sales document. Leave the field blank if local currency is used.
 - **Payment Terms Code** – Select a formula that calculates the payment due date, payment discount date, and payment discount amount.

- **Payment Method Code** – Select how to make payment, such as with bank transfer, cash, or check.
- **Payment Discount %** – Enter the payment discount percentage granted if the customer pays on or before the date entered in the **Pmt. Discount Date** field.

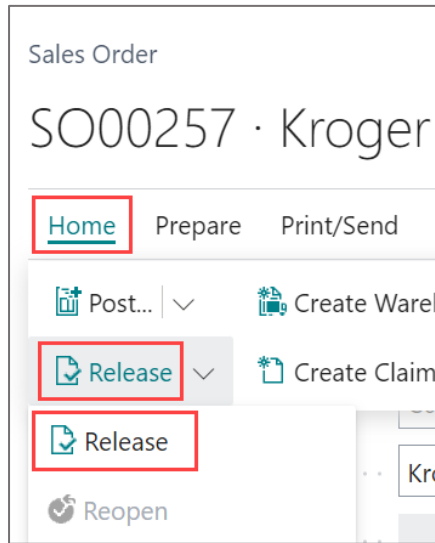
5. On the **Shipping and Billing** FastTab, confirm or select the **Ship-to** and **Bill-to** locations. Select a shipment method in the **Code** field to specify how items on the sales document are shipped to the customer.

6. On the **Prepayment** FastTab, enter/select the following fields:
 - **Prepayment %** – Enter the prepayment percentage to use to calculate the prepayment for sales.
 - **Prepmt. Payment Terms Code** – Select the code that represents the payment terms for prepayment invoices related to the sales document.
 - **Prepmt. Payment Discount %** – Enter the payment discount percent granted on the prepayment if the customer pays on or before the date entered in the **Prepmt. Pmt. Discount Date** field.

7. On the **Lines** FastTab, enter/select the following fields:
 - **Type** – Select the type of transaction that will be posted with the document line. If you select *Comment*, then you can enter any text in the **Description** field, such as a message to a customer.
 - **No.** – Select the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the **Type** field.
 - **Description** – Enter a description of the entry of the product to be sold. To add a non-transactional text line, fill in the **Description** field only.
 - **Quantity** – Enter how many units are being sold.

| Type | No. | Item Cat... | Location Code | Description | Quantity | Weight Quantity (LB) |
|------|-------|-------------|---------------|-----------------------------|----------|----------------------|
| Item | FG777 | | MAIN | Frozen Crescent Rolls (...) | 50 | - |

8. On the action bar, select **Home > Release > Release**.



The sales order is released.