

Sales Order Entry

Quick Reference Guide

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 P, enter **Sales Orders**, and then choose the related link.

Tell me what you want to do		\mathcal{Z} \times
Sales orders		
Go to Pages and Tasks		Show all (10)
> Sales Orders	Lists	

The Sales Orders list page opens.

2. On the action bar, select New.



The Sales Order card page opens.

			Ø	Ŕ	+	١			ď
Sal	es O	rder							
Home	Prepare	Print/Send	Request Approval	Order	Complianc	e Documents	Report	Actions \lor	
≭ Ger	neral >								Open
Claim N	o. · · · · · ·								
Lines	>								
Invoid	e Details	>							No
Shipp	ing and B	illing >							
Prepa	yment>								0

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

General			Show le
Customer No.	C00001 ~	Requested Delivery D	6/21/2024
Customer Name	Kroger	Promised Delivery Da	6/21/2024
Business Posting Typ		External Document No.	
Business Posting Typ	-	Your Reference	
Sell-to		Salesperson Code	\\
Address	9696 East Boston St.	Inside Salesperson C	\
Address 2		Include for Cut-off Ti	
City · · · · · · · · · · · · · · · · · · ·	Deer Park	Campaign No.	
Sell-to State	NY	Opportunity No.	
ZIP Code	11729	Responsibility Center · · ·	

- 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.

Invoice Details			Show les
Currency Code USD	~ ····	Payment Service	No payment service is made available.
Company Bank Acco	~		
VAT Bus. Posting Gro	~		
Customer Posting Gr VSD		Shortcut Dimension 1	~
Payment Terms Code ···· NET 1	~	Shortcut Dimension 2	~
Payment Method Code ACCO	INT ~	Payment Discount %	2
Tax Liable		Pmt. Discount Date	6/14/2024
Tax Area Code	~	Direct Debit Mandate	~
		Sales Price Reference	

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.

Shipping and Billing				Show less
Ship-to De	efault (Sell-to Address)	\checkmark	Stop Sequence No.	0
Contact			Shipping Advice	Partial \checkmark
Shipment Method			Outbound Whse. Han	
Code	ELIVERY	\checkmark	Shipping Time	
Agent		\checkmark	Delivery Starting Time	
Agent Service		\checkmark	Delivery Ending Time	
Package Tracking No.			Delivery Appointmen	
Bill-to De	efault (Customer)	\checkmark	Late Order Shipping	No
Location Code · · · · · · M	AIN	\checkmark	Combine Shipments	
Shipment Date	/3/2024		Completely Shipped	No
Transport Route Code		\checkmark		

- 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.

Prepayment	
Prepayment %	5 Prepmt. Payment Dis 2
Compress Prepayment 🕔 🌑	Prepmt. Pmt. Discoun 6/14/2024
Prepmt. Payment Ter	Prepmt. Include Tax · · · · •
Prepayment Due Date · · 6/17/2024	

- 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.

🛧 Sur	nnest sales	lines	^{₽#} New Line	🔆 Delete Line		
• 54	Jgcor ource		a retreate	Service Ente		
	No.	Upd Item Cat	Location Code	Description	Quantity	Weight Quantity (LB)
:	FG777		MAIN	Frozen Crescent Rolls (50	-
	♣ Sug	◆ Suggest sales	Upd Item No. Cat	◆ Suggest sales lines → [™] New Line Upd Item Location Cat Code	◆ Suggest sales lines → ^{**} New Line → Delete Line Upd Item Location Cat Code Description	◆ Suggest sales lines → ^{**} New Line → Delete Line Upd Item Location Cat Code Description Quantity

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

_

Sales Order	
SO00257	· Kroger
Home Prepare	e Print/Send
🛅 Post 🗸	龍 Create Warel
Release 🗸	1 Create Claim
Release	Kro
🕙 Reopen	KI

The sales order is released.