

How to Create Standard Sales Order

Below are the steps in creating a standard Sales Order.

1. Open the **Sales | Sales Orders** menu. If there is no existing record yet, this will open a new Sales Order screen. If not, click the **New** button on the integrated search grid. You will notice that some of the fields, like the **Type**, **Date**, **Due Date**, **Location**, **Ordered By**, **Status**, and **Currency** are already populated by default. You can still change these value if necessary.
2. Fill out the header details as needed. The required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
 - a. **Type** is already set to Standard by default. Leave it as is.
 - b. Select the **Customer** to whom the order is from.
 - c. Select a different **Location**, **Bill To**, **Ship To**, **Terms**, and **Currency** if needed. But don't leave these fields blank.
 - d. Enter other details that you see necessary. Refer to [Sales Order | Field Description | Header Details](#) to help you in filling out the fields.
3. Add details on grid. Refer to [Sales Order | Field Description | Grid Details](#) to help you in filling out the fields. Note that **UOM** is a required detail. Complete filling in the **Item No**, **Ordered**, **Price**, and other fields necessary to ensure they are appropriate for the customer's order.

Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
					0.00	0.00	0.00%	0.00	0.000000	0.00	

The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
			sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

4. Click **Save** button. Notice that the **Order No** field will be filled in with a unique and system generated number.

 You can skip saving the record if the transaction is to be *duplicated* or *processed to inventory shipment* or *processed to Invoice* right away since it will be saved automatically.

Here is a sample Sales Order.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Blend Pick Ticket Pick List Ship Invoice Duplicate Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (3) Comments (0) Approval (0)

Type: Standard Recurring: Bill To: ABC Reseller PO Number: PQ#05 Order No: SO-168

Customer: ABC Reseller Ship To: ABC Reseller BOL No: BOL#05 Split:

Date: 6/30/2016 Ordered By: irelyadmin Status: Open Salesperson: Jared Smith

Due Date: 7/30/2016 Ship Via: UPS Freight Term: Pickup Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Comments: Standard SO

Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Ga...	Gallon	0.00	100.00	10.00%	22.81	1.850000	166.50	IN SST
			sample misc ite...		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Item: Quote: Subtotal: 177.00

On Hand: On Order (PO): Shipping: 0.00

Committed: Back Order: Tax: 22.81

Total: 199.81

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2. Fill out the header details as needed. Refer to [Sales Order | Field Description | Header Details](#) to help you in filling out the fields. Note that the required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
3. Add details on grid. Refer to [Sales Order | Field Description | Grid Details](#) to help you in filling out the fields. Note that **UOM** is a required detail. Complete filling in the **Item No**, **Ordered**, **Price**, and other fields necessary to ensure they are appropriate for the customer's order.

Item No	Contract No	Contract Seq	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
					0.00	0.00	0.00%	0.00	0.000000	0.00	

The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

Item No	Contract No	Contract Seq	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
			sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

- Click **Save** button. Notice that the **Order No** field will be filled in with a unique and system generated number.

 You can skip saving the record if the transaction is to be *duplicated* or *processed to inventory shipment* or *processed to Invoice* right away since it will be saved automatically.

Here is a sample Sales Order.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Pick Ticket Ship Invoice Duplicate Customer Close

Details Instructions Payments (0) Attachments (0) Audit Log (1) Comments (0)

Type: Standard Recurring: Bill To: ABC Reseller Ordered By: jirelyadmin Order No: 50-75

Customer: ABC Reseller Ship To: ABC Reseller PO Number: PO#05 Salesperson: Jared Smit Status: Open

Date: 04/19/2016 Due: 05/19/2016 Ship Via: UPS BOL No: BOL#05 Split: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Freight Term: Deliver Comments: Sample Sales Order.

Item No	Contract No	Contract Seq	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
			sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United Item: On Hand: On Order (PO): Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United Committed: Back Order: Shipping: 0.00 Tax: 16.65 Total: 212.15

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- Open the **Sales | Sales Orders** menu. If there is no existing record yet, this will open a new Sales Order screen. If not, click **New** button on the integrated search grid.

iRely i21 - i21 Demo Setup Company(Source)

Menu Filter Menu

- Sales
 - Quotes
 - Sales Orders**
 - Invoices
 - Receive Payments
 - Receive Payment Details
 - Batch Posting
 - Batch Printing

Sales Order

New View Refresh Export Close

Layout Filter Records (F3) 6 records

Sales Order Number	Customer Name	Customer Number
SO-3	ABC Reseller	0001005066
SO-2	Brown Brother Farms	0001005006
SO-1	Archer Daniels Midland	0001005008

You will notice that some of the fields, like the **Type**, **Location**, **Invoice Date**, **Due**, **Ordered By**, **Status**, and **Currency** are already populated by default.

- Fill out the header details as needed. Refer to [Sales Order | Field Description | Header Details](#) to help you in filling out the fields. Note that the required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
- Add details on grid. Refer to [Sales Order | Field Description | Grid Details](#) to help you in filling out the fields. Note that UOM is a required detail. Complete filling in the Item No, Ordered, Price, and other fields necessary to ensure they are appropriate for the customer's order.

Item No	Contract...	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00	12.95	1.850000	185.00	IN SST
					0.00	0.00	0.00	0.00	0.000000	0.00	

The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

Item No	Contract...	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00	12.95	1.850000	185.00	IN SST
			sample misc item		0.00	5.00	0.00	0.00	4.160000	20.80	
					0.00	0.00	0.00	0.00	0.000000	0.00	

- Click **Save** button. Notice that the **Invoice No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be duplicated or processed to inventory shipment or processed to Invoice right away since it will be saved automatically.

Here is a sample Sales Order.

Details Attachments Audit Log

Type: Standard Recurring: Bill To: ABC Reseller Ordered By: irelyadmin Order No: 50-4
 Customer: 0001005066 Ship To: ABC Reseller PO Number: PO#04 Salesperson: 0001005049 Status: Open
 Date: 01/21/2016 Due: 01/21/20 Ship Via: Truck BOL No: BOL#04 Split: Currency: USD
 Location: 0001 - Fort Wayne Terms: Due on Receipt Freight Term: Truck Comments: Sample sales order.

Item No	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
87G		87 Unleaded Gasoline	Gallon	0.00	100.00	0.00	12.95	1.850000	185.00	IN SST
		sample misc item		0.00	5.00	0.00	0.00	4.160000	20.80	
				0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, IN, 46040, United States
 Ship To: ABC Reseller Somewhere St. Fortville, IN, 46040, United States
 Item: D2D - #2 Dyed Diesel
 On Hand: 0.00 On Order (PO): 0.00
 Committed: 0.00 Back Order: 0.00
 Subtotal: 205.80
 Shipping: 0.00
 Tax: 12.95
 Total: 218.75

1. Open the **Sales | Sales Orders** menu. If there is no existing record yet, this will open a new Sales Order screen.
2. On the grid search, click the **New toolbar button** to open a new Sales Order screen. You will notice that some of the fields, like the **Location, Date, Currency, and Order Status**, are already populated by default.
3. Enter the header details as needed. Refer to [Sales Order | Field Description | Header Details](#) to help you in filling out the fields.
4. Enter the grid details as needed. Complete filling in the Item No, Ordered, Discount, and other fields necessary to ensure they are appropriate for the customer's order.

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Other Charge	other charge	Hour	2.00	0.00	2.00	0.00	21.55	42.24
			0.00	0.00	0.00	0.00	0.00	0.00

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Discount, and Price. Refer to [Sales Order | Field Description | Grid Details](#) to help you in filling out the fields.

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Other Charge	other charge	Hour	2.00	0.00	2.00	0.00	21.55	42.24
sample miscellaneous item			3.00	0.00	0.00	0.00	15.00	45.00
			0.00	0.00	0.00	0.00	0.00	0.00

5. Click **Save button**. Notice that the **Order No** field will be filled in with a unique and a system generated number. The **Customer, Location, Bill To, Ship To, and Terms** are the required details in saving a Sales Order.



You can skip saving the record if the transaction is to be duplicated or processed to inventory shipment right away since it will be saved automatically.

Here is a sample Sales Order.

The screenshot shows the 'Sales Order - Home Dealers' application window. The 'Details' tab is active, displaying the following information:

- Customer:** HOMEDEALER
- Location:** 1000-Location A
- Date:** 06/30/2015
- Currency:** USD
- BOL No.:** (empty)
- Order Status:** Open
- Order No.:** SO-1
- Bill To:** US (18 Central St., Edison, OH, 43320)
- Ship To:** US (18 Central St., Edison, OH, 43320)
- Salesperson:** JAS
- PO Number:** PO32156
- Ship Via:** UPS Ground
- Terms:** Due 28th of the Month
- Ordered By:** AGADMIN
- Due Date:** 07/28/2015
- Comments:** This is a sample Sales Order.
- Freight Terms:** (empty)
- Split:** (empty)

Below the header fields is a grid with the following data:

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Other Charge	other charge	Hour	2.00	0.00	2.00	0.00	21.55	42.24
sample miscellaneous item			3.00	0.00	0.00	0.00	15.00	45.00
			0.00	0.00	0.00	0.00	0.00	0.00

At the bottom right of the grid, there is a summary section:

Item:	Other Charge - other charge	Subtotal:	87.240000
On Hand:	0 On Order (PO): 0	Shipping:	0.000000
Committed:	0 Back Order: 0	Tax:	0.000000
		Total:	87.240000

Below are the steps in creating a Sales Order.

1. Open the **Accounts Receivable > Activities > Sales Order** menu. If there is no existing record yet, this will open a new Sales Order screen and then proceed to step 3. If there are existing record, this will open the **Search Sales Order** screen. If the search screen is displayed, proceed to step 2.
2. On the search screen, click the **New toolbar button** to open a new Sales Order screen. You will notice that some of the fields, like the **Order Type, Location, Date, Currency, and Order Status**, are already populated by default.
3. Enter the header details. A list of the **Details tab > Header fields** is listed in [Sales Order](#).
4. Enter the grid details. Complete filling in the Location, Item No, Ordered, Discount, and other fields necessary to ensure they are appropriate for the customer's order. Note that before selecting an Item No, you need to select a **Location** to filter the items per location.

Location	Item No	Description	UOM	Ordered	Discount	Price	Total
01	SWITCH	On/Off Light Kit Switch For Ceiling Fan - WITH GL SETUP	EACH	1.00	1.11	20.92	20.69

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Location, Description, Ordered, Discount, and Price. A list of the **Details tab > Grid Details** is listed in [Sales Order](#).

Location	Item No	Description	UOM	Ordered	Discount	Price	Total
01	SWITCH	On/Off Light Kit Switch For Ceiling Fan - WITH GL SETUP	EACH	1.00	1.11	20.92	20.69
01		sample miscellaneous item		1.00	0.00	10.00	10.00

5. Click **Save button**. Notice that the **Order Number** field will be filled in with a unique and a system generated number.

You can skip saving the record if the transaction is to be **duplicated** or **processed to invoice** right away since it will be saved automatically.

Here is a sample Sales Order.

Sales Order

New Save Search Delete Undo Process Duplicate Customer Close

Details Payments History Item History Attachments

Order Type: Order Customer: 1000000001 Location: 01 Date: 02/25/2015 Currency: USD Order Status: Pending Order No: SO-1

Bill To: US Attn: Carla Brown 18 Central St. Edison, OH, 43320 Ship To: PH Attn: Amaya Castro Paseo de Roxas St. Makati, NCR, 1227 Sales Rep: WJH PO Number: PO11 Ship Via: UPS Ground Ordered By: Terms: 5% 5 NET 30 BOL No: Due Date: 03/27/2015 Split: Comments: This is test sales order.

Remove Filter Records (F3)

Location	Item No	Description	UOM	Ordered	Discount	Price	Total
01	SWITCH	On/Off Light Kit Switch For Ceiling Fan - WITH GL SETUP	EACH	1.00	1.11	20.92	20.69
01		sample miscellaneous item		1.00	0.00	10.00	10.00

Subtotal: 30.69
Shipping: 0.00
Tax: 0.00
Total: 30.69

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