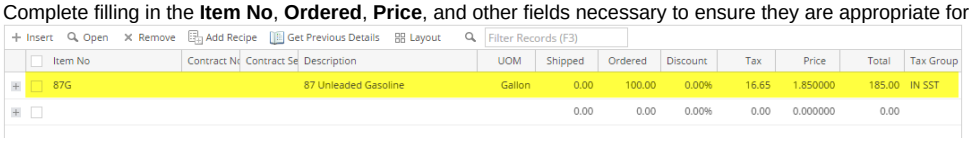
How to Create Standard Sales Order

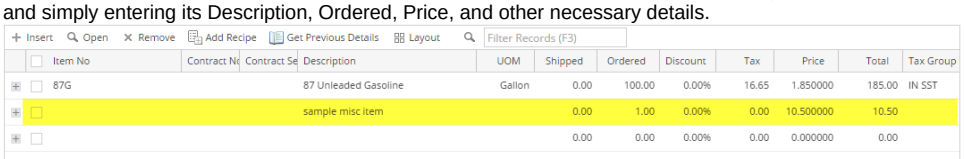
Below are the steps in creating a standard Sales Order.

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 Se	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.

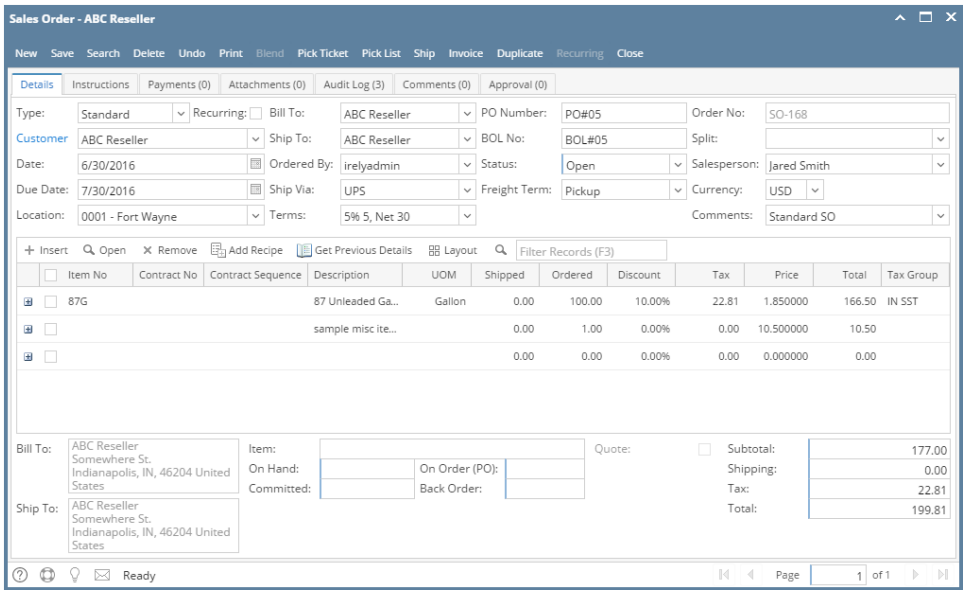


Item No	Contract No	Contract Se	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
			sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

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

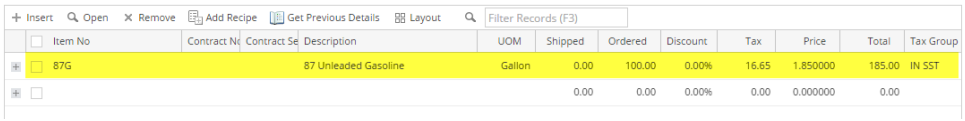
> *You can skip saving the record if the transaction is to be duplicated or processed to inventory shipment or processed to Invoice right away since it will be saved automatically.*

Here is a sample Sales Order.

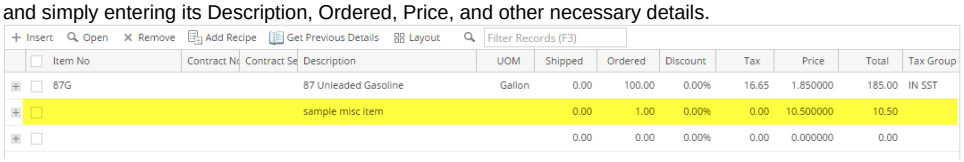


Below are the steps in creating a Sales Order.

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 **New button** on the integrated search grid.
   You will notice that some of the fields, like the **Type**, **Location**, **Date**, **Due, Ordered By, Status**, and **Currency** are already populated by default.
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.



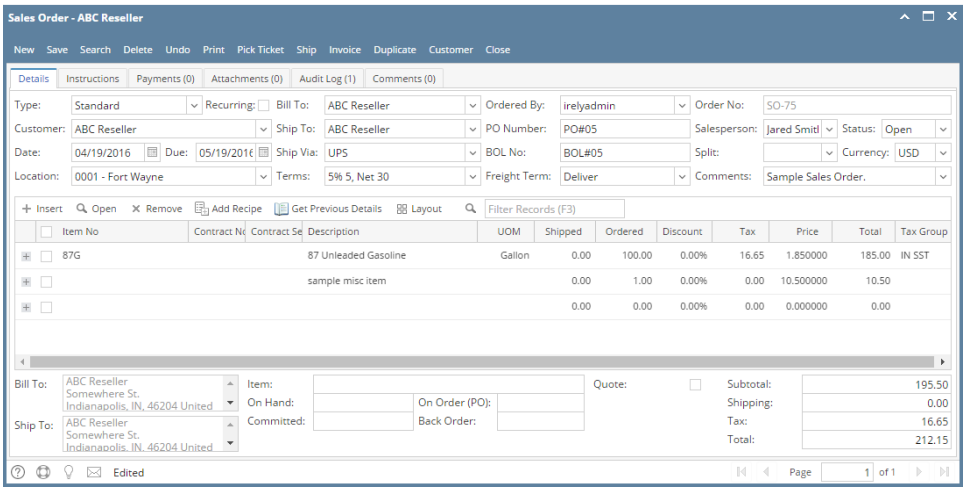
The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.



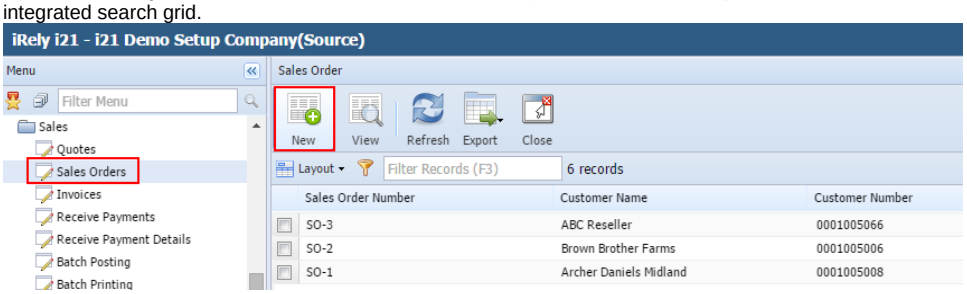
4. Click **Save button**. Notice that the **Order No** field will be filled in with a unique and system generated number.

> *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.

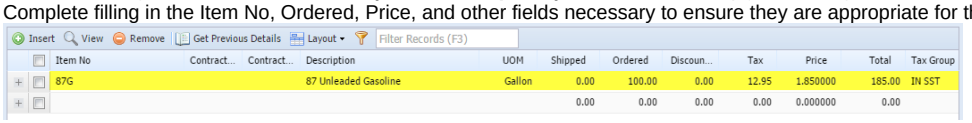


1. Open the **Sales | Sales Orders menu**. If there is no existing record yet, this will open a new Sales Order screen. If not, click **New button** on the integrated search grid.

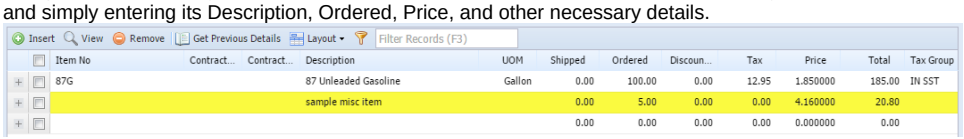


You will notice that some of the fields, like the **Type**, **Location**, **Invoice Date**, **Due, Ordered By, Status**, and **Currency** are already populated by default.

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.



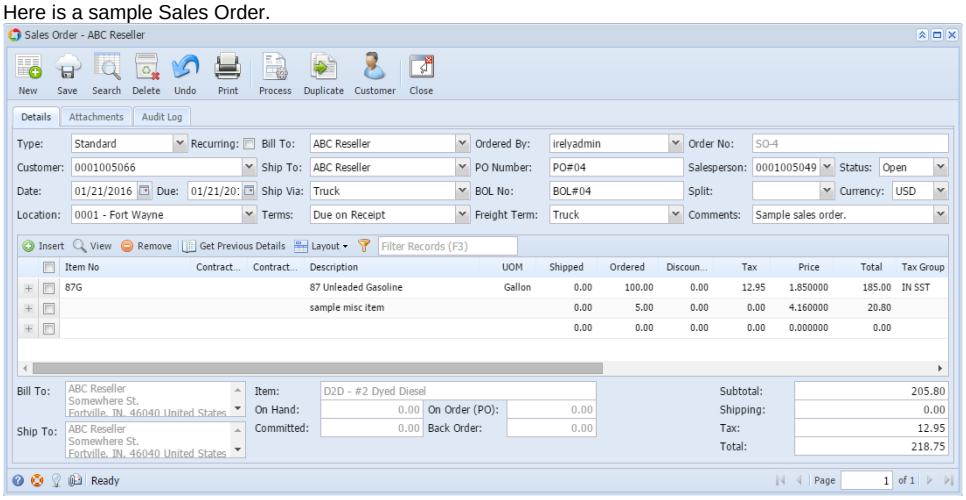
The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.



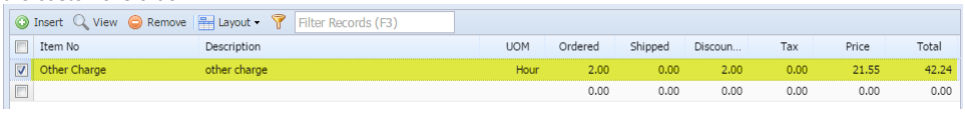
4. Click **Save button**. Notice that the **Invoice No** field will be filled in with a unique and system generated number.

> *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.*

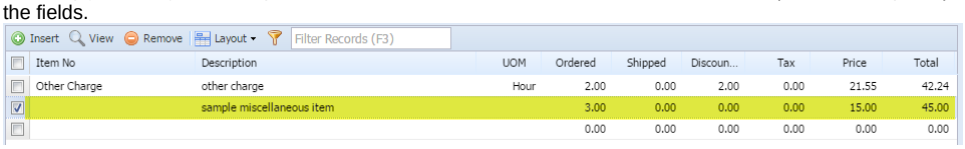
Here is a sample Sales Order.



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.



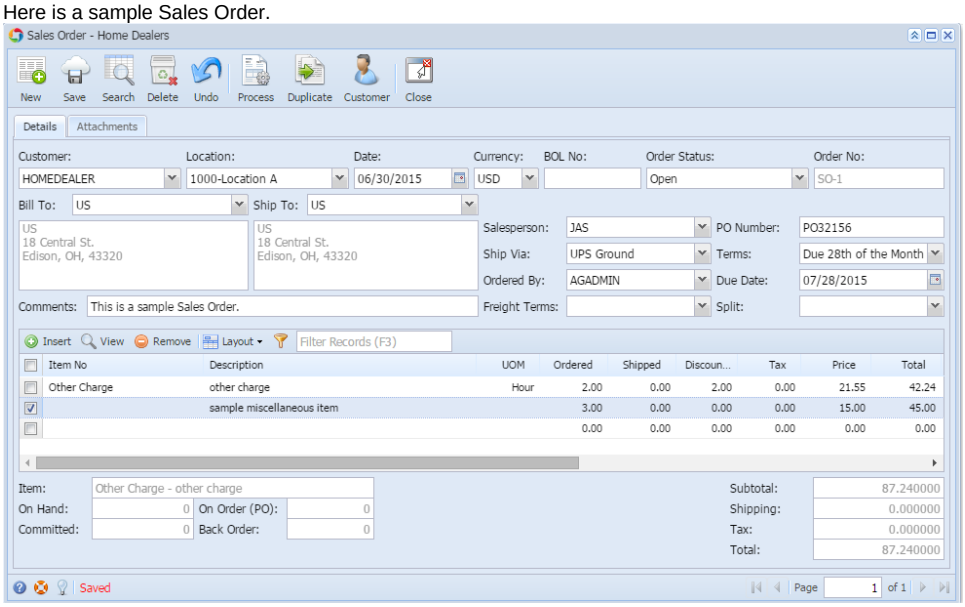
The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Discount, and Price. Refer to Sales Order | Field Description | Grid Details to help you in filling out the fields.



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.

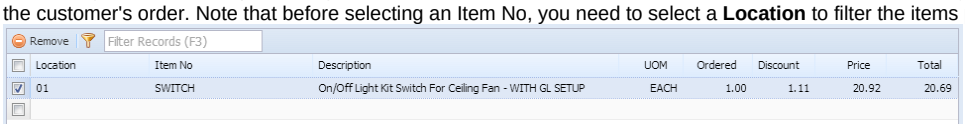
> *You can skip saving the record if the transaction is to be duplicated or processed to inventory shipment right away since it will be saved automatically.*

Here is a sample Sales Order.

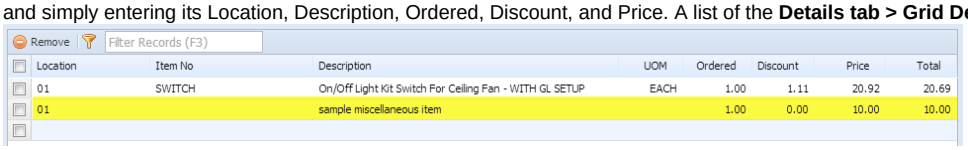


Below are the steps in creating a Sales Order.

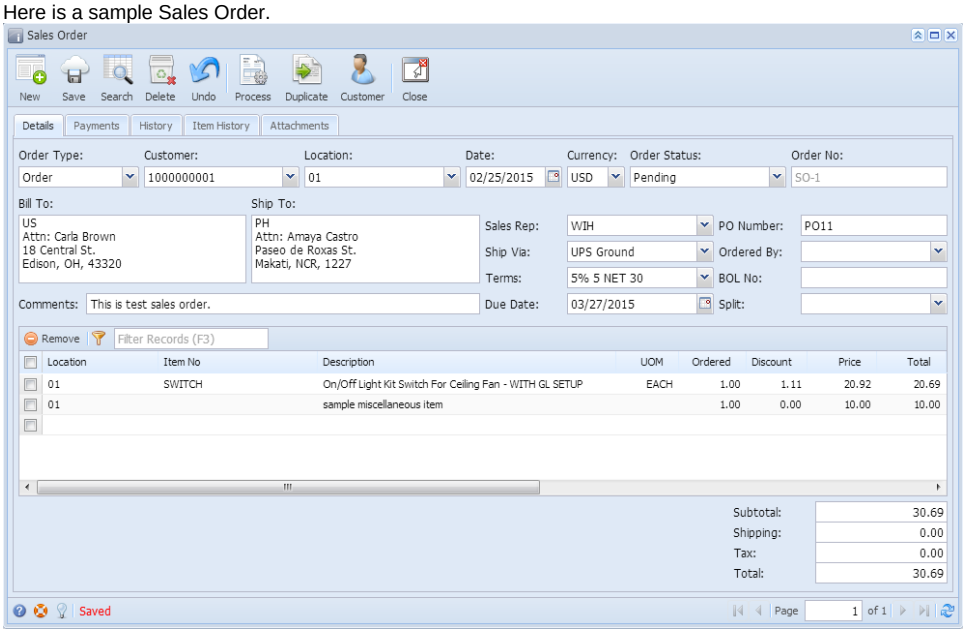
1. Open the **Accounts Receivable > Activities > Sales Order menu**. If there is no existing record yet, this will open a new Sales Order screen and then proceed to step 3. If there are existing record, this will open the **Search Sales Order** screen. If the search screen is displayed, proceed to step 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.



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.



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.*

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