




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.

+ Insert Q Open X Remove  Add Recipe  Get Previous Details  Layout Q <input type="text" value="Filter Records (F3)"/>																
<input type="checkbox"/>	Item No	Contract No	Contract Seq	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group				
<input checked="" type="checkbox"/>	87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST				
<input type="checkbox"/>						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.

+ Insert Q Open X Remove + Add Recipe + Get Previous Details + Layout Q Filter Records (F3)																
<input type="checkbox"/>	Item No	Contract No	Contract Seq	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group				
<input checked="" type="checkbox"/>	87G			87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST				
<input checked="" type="checkbox"/>	<input type="checkbox"/>			sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50					
<input type="checkbox"/>						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 *deduplicated* 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: PO#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

+

Insert

Q

Open

X

Remove

+

Add Recipe

+

Get Previous Details

+

Layout

Q

Filter Records (F3)

<input type="checkbox"/>	Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
<input checked="" type="checkbox"/>	87G			87 Unleaded Ga...	Gallon	0.00	100.00	10.00%	22.81	1.850000	166.50	IN SST
<input checked="" type="checkbox"/>				sample misc ite...		0.00	1.00	0.00%	0.00	10.500000	10.50	
<input checked="" type="checkbox"/>						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:
On Hand:
Committed:

Quote: ☐ Subtotal: 177.00
Shipping: 0.00
Tax: 22.81
Total: 199.81

?

Ready

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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.

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 *uplicated* 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: irelyadmin Order No: SO-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

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 Orders

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 *deduplicated* 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

Details | Attachments | Audit Log

Type: Standard | Recurring: ☐ | Bill To: ABC Reseller | Ordered By: irelyadmin | Order No: SO-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.

Insert | View | Remove | Get Previous Details | Layout | Filter Records (F3)

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

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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.

Insert | View | Remove | Layout | Filter Records (F3)

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.

Insert | View | Remove | Layout | Filter Records (F3)

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 *deduplicated* 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 header information for a sales order. The header fields include Customer (HOMEDEALER), Location (1000-Location A), Date (06/30/2015), Currency (USD), BOL No., Order Status (Open), and Order No. (SO-1). Below the header, there are fields for Bill To (US), Ship To (US), Salesperson (JAS), PO Number (PO32156), Ship Via (UPS Ground), Terms (Due 28th of the Month), Ordered By (AGADMIN), Due Date (07/28/2015), Freight Terms, and Split. A comments field contains the text 'This is a sample Sales Order.' Below the header fields is a grid with columns: Item No, Description, UOM, Ordered, Shipped, Discount, Tax, Price, and Total. The grid contains three rows: '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), and a blank row (0.00, 0.00, 0.00, 0.00, 0.00, 0.00). Below the grid, there are fields for Item (Other Charge - other charge), On Hand (0), On Order (PO) (0), Committed (0), Back Order (0), Subtotal (87.240000), Shipping (0.000000), Tax (0.000000), and Total (87.240000). The bottom status bar shows 'Saved' and 'Page 1 of 1'.

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 screenshot shows a grid with columns: Location, Item No, Description, UOM, Ordered, Discount, Price, and Total. The grid contains two rows: '01 SWITCH On/Off Light Kit Switch For Ceiling Fan - WITH GL SETUP' (EACH, 1.00, 1.11, 20.92, 20.69) and a blank row.

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](#).

The screenshot shows a grid with columns: Location, Item No, Description, UOM, Ordered, Discount, Price, and Total. The grid contains three rows: '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), and a blank row.

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: W/H PO Number: PO11

Ship Via: UPS Ground Ordered By:

Terms: 5% 5 NET 30 BOL No:

Comments: This is test sales order. Due Date: 03/27/2015 Split:

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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