Creating a New Sales Order

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To create a sales order, choose New Sales Order from the Sales menu, or simply hit Ctrl-S. A Sales Order form will appear.

First, you will need to select a Customer as well as choose the address to which the order will be sent (if the Customer has more than one). Then, choose the Location from which you will be sending the order.

The icons above the drop-down lists act as buttons to edit the Customer/Ship To Address/Ship From Location, or to simply view the Customer or Location info.

You can also specify items such as Payment Terms, the Sales Rep, Freight-on-Board, Class (a category field used in QuickBooks), the Promise Date, and the Customer PO number, if applicable. The information for the Term and FOB fields are drawn from their corresponding profile lists. The Sales Rep data is taken from your QuickBooks database.

From there, choose an Item from the drop-down list on the order grid. Most of the other fields in the grid will auto-fill based on what you select.

Fill in the amount ordered, and make any other adjustments as necessary. If desired, you can adjust the contents of the Price Per field to reflect item discounts or markups. These adjustments are taken from the Price Levels profile list:

Just choose the Price Level that reflects the special offer or group discount, and the item price will update itself accordingly.

On the far-right of the line item is the Details column with a blue arrow on each line. This allows you to complete the listed actions including:

entering multiple Ship Dates and Ship To Addresses, Change the Unit of Measure just for this order, and make Request for Quotes.

Below the order grid, you have drop-down list fields for computing discounts and freight. Tax codes for shipping charges and discounts can be changed if needed on a per document basis:

Additionally, the Memo tab at the bottom of the dialog serves as a miscellaneous field for the order-takers to jot down any additional information as well as identify themselves as the person who took the order. Internal Notes tab will turn red to alert other users when there is a important message regarding this order. The Margin tab will show a total price and cost of all items combined, with the margin dollar amount and percentage. Once the sales order has been filled and a ship doc is created, the SDs tab will list all ship docs linked to the sales order.

Now that the order is ready to go, you have a few options as to how to proceed. In the Sales Order preferences, you have the option of specifying whether Sales Orders require approval before they're able to be processed. If your company does have an order approval process, an Approved checkbox will appear on each order, letting users who have appropriate permission levels approve the order for processing.

The On Hold checkbox allows you to check if this specific order is not to be filled until it is unchecked. To place the customer on hold, go to the Customer screen --> Payment Info tab, and check Hold Orders. By checking this box, it will update all of the customer's open orders.


Orders can be processed (filled) in one of the three following ways:

- To automatically create a Ship Doc from this order, just click the Fill button on the tab's toolbar. Provided you've specified a Ship From Location, and there is only one Ship To Location and one Ship Date, then a Ship Doc will appear with the information already filled in. If the Ship From location is left blank, or there are multiple Ship To's or Ship (release) Dates, then the Batch Shipping form will open instead, and the user can select the shipping location then.

- You can also fill a Sales Order from the Batch Shipping form. This will list all open Sales Orders and indicate their 'Can Ship' status. Clicking Process will create a batch shipping report.

- Provided the Auto allocate dependencies option within Inventory Preferences is checked, then a Sales Order will be filled automatically whenever you receive a Purchase Order or finish a Work Order upon which the sales order in question is dependent or linked.

Once finished, you may wish to email a copy of the sales order to the Customer. To do so, simply click the Email button on the tab's toolbar. A PDF of the sales order will be automatically generated and attached to the outgoing message. To save the SO, just choose one of the options from the Save drop-down menu on the tab's toolbar.

Now, keep in mind that if the payment term you chose in the Term field isn't based on accounts receivable, you'll need to enter payment info for the order before it can be processed. After setting the term, a Payments/Credits tab should appear in the lower left-hand corner of the application window that looks like this:
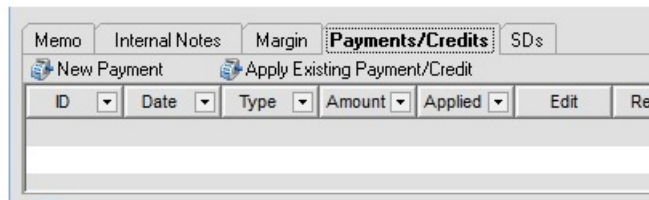
Click the New Payment button to enter transaction information for this order:
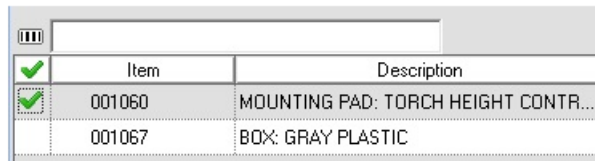

Just enter the payment details, including the method and amount. For credit card payments, you'll be prompted for the card details.   Click the link for more information on receiving payments on sales orders and ship docs. It also gives more details on Receiving Payments in QuickBooks to record the cash receipt in QuickBooks when saving the sales order.
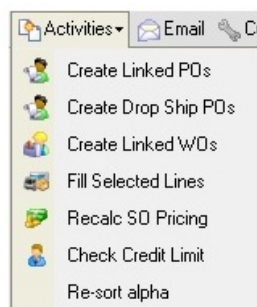
Keep in mind that you have a few additional options by way of the Activities button, toolbar. It opens a drop-

down menu, by which you can execute the following commands:

- Create Linked PO (Purchase Order): This opens the Reorder Analysis screen, allowing you to quickly place a purchase order for Items from the Sales Order that you don't currently have on hand.

- Create Linked Drop Ship PO: This option will automatically create a related Purchase Order from your Sales Order, allowing your preferred Vendor(s) of the Item(s) in question to drop ship directly to the Customer.

- Create Linked WO (Work Order): This opens the Reorder Analysis screen, allowing you to quickly place a work order to create any Items from the Sales Order that you don't currently have on hand.

- Fill Selected Lines: By checking the box on the line item, this allows you to select the items to be filled on the ship doc. The "Auto Fill quantity on shipping" preference must be checked in order for this to work under Shipping preferences and the Filling tab.

- Recalc SO Pricing: This option completely resets all pricing adjustments you've made on the Sales Order.

- Check Credit Limit: The customers credit limit and open balances pop up when pressing this option.

- Re-sort alpha: The list of items will be sorted in numerical order first, then alphabetically.