Typical Sales Cycle Work Flow

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The purpose of this topic is to describe in general terms the sales cycle within All Orders. There are many variations on this work flow which will be discussed in other topics.

In All Orders the 'trigger' for a sale is a document called a 'Ship Doc'. A Ship Doc can be created by filling a sales order OR created without a sales order. The information contained on a Ship Doc is used by All Orders to generate an invoice in QuickBooks.

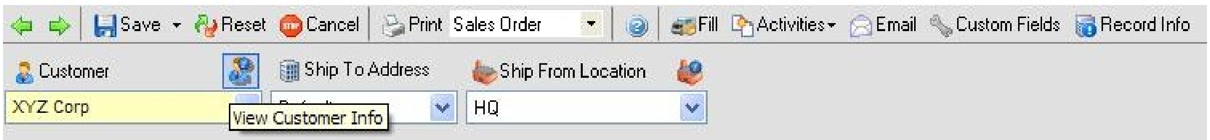
A few important notes regarding a Ship Doc is a follows:

1. The Ship Doc is 'ship from location' specific meaning that a Ship Doc will decrement inventory from one location at a time.
2. The Ship Doc is 'ship to' specific meaning that a Ship Doc can only ship to one customer ship to address a one time.
3. The Ship Doc is 'item ship date' specific, meaning that if you have multiple ship dates on a single sales order, one ship date will be created per item ship date.
4. A Ship Doc can be marked as shipped or unshipped my checking or un-checking the Shipped box. The 'Is Shipped' flag has the following considerations:
    - A Ship Doc can be marked as Shipped but not invoiced and visa versa;
    - You can use an unshipped Ship Doc to 'Allocate' stock to an order;
    - You can continue to add quantity to unshipped Ship Doc by subsequent Fills of a sales order;
    - A Ship Doc will be recorded in the All Orders ledger ONLY when it is marked as shipped. Therefor the Ship Doc P&L will show data AFTER it is marked as shipped.

From the Home tab All Orders you can see the sales cycle.

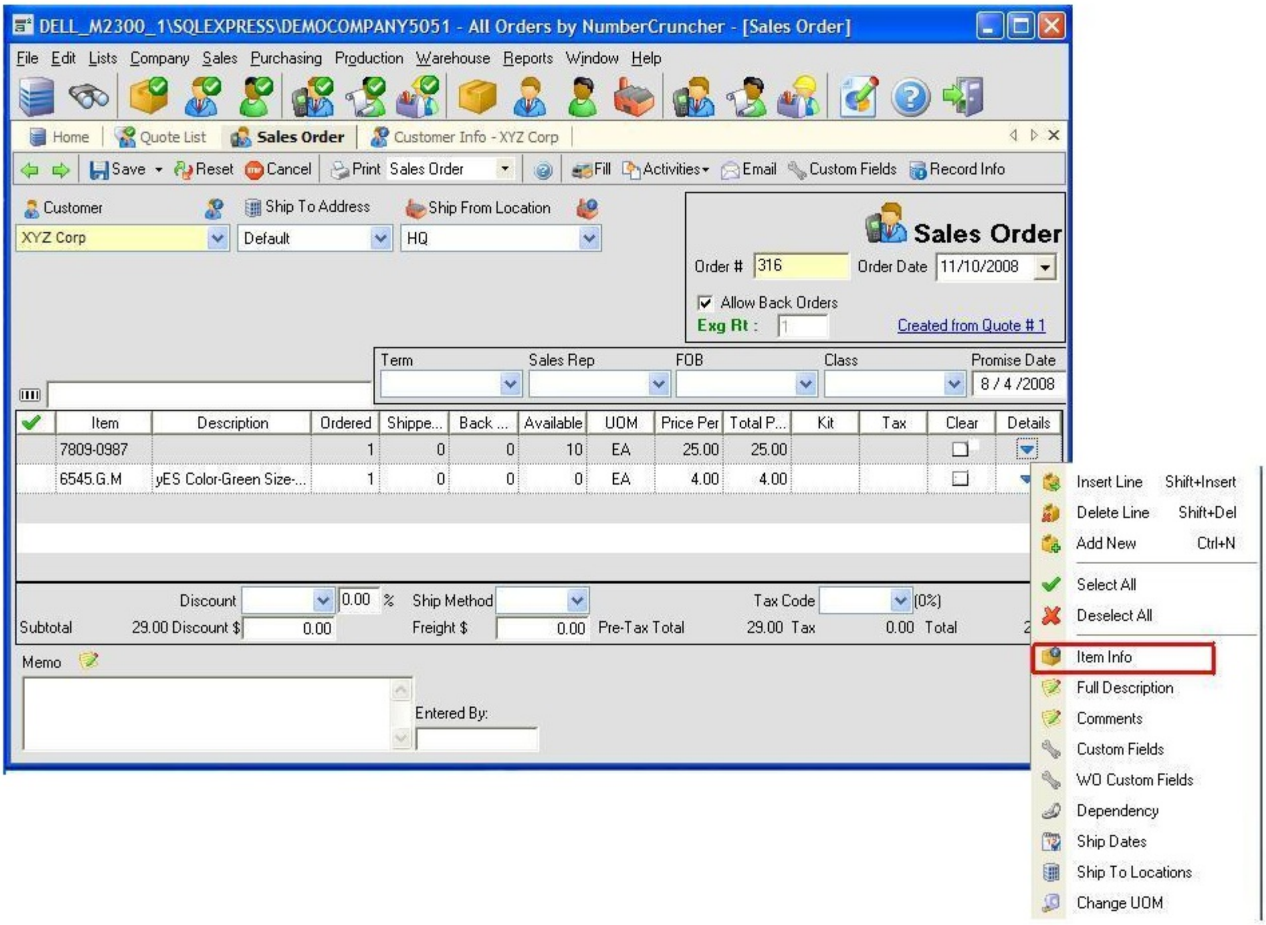
You start by creating your customers. If required you create a quote. A quote does not affect demand for quantity or what is referred to a 'Required' until the quote is converted to a sales order. You can view open quotes from the Quotes List. A quote can be converted to a sales order by clicking the 'Create Sales Order' button. You can close a quote without creating a sales order by CHECKING the 'Clear' box on each line of the quote. You can skip the quote and create a sale orders directly. After creating your quote or sales order you can print them using the Print button or email them using the Email button.

From the sales order you can quickly see information on the customer and items. For example you may want to review the open sales orders or past shipments. You can obtain such information by clicking the customer info button.

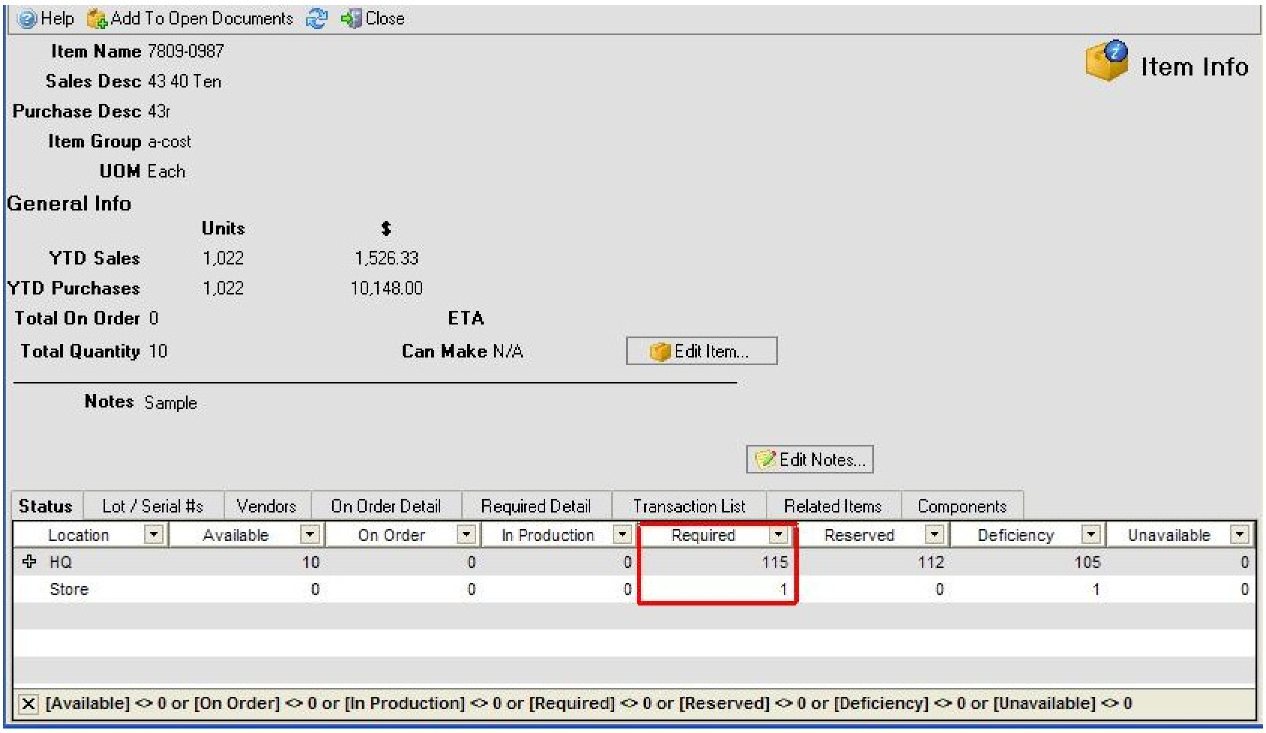


In order for an item to be added to any sales transaction, it must belong to a group in which the 'Is Sold' box is checked.

You can see the 'Available' and ‘Avail-On SO’ quantity for each item on your sales order. Additionally you can view additional information on the items on your sales order by clicking the details button on each line item of the sales order and selecting Item Info.

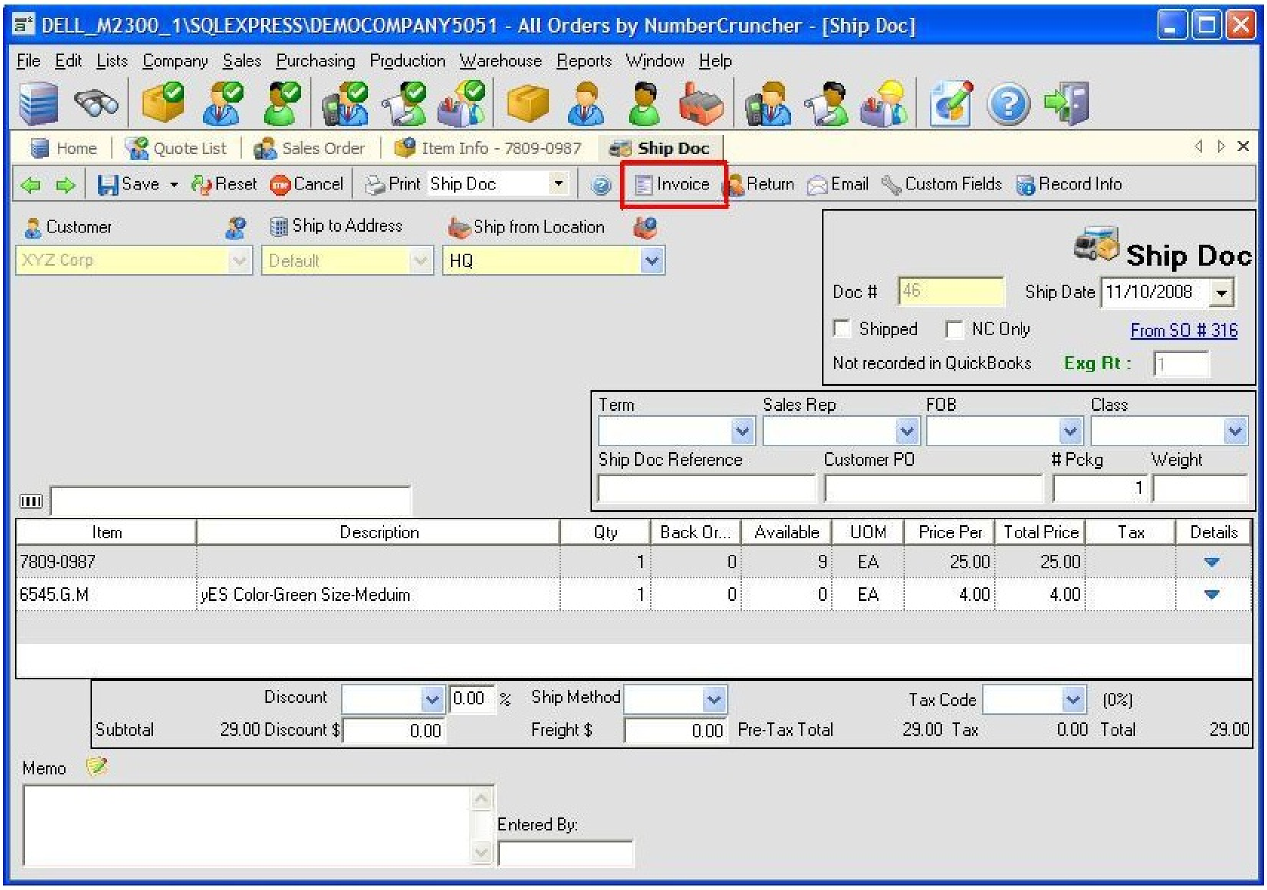


As noted previously, you create demand or 'Required' for each item on your sales order. Using the Item Info you can see the aggregate Required for all open sales orders.



To create a Ship Doc for the order, click the Fill button.   If you have selected a 'Ship From Location' and there aren't multiple shipping dates or shipping locations plus you have auto-fill shipping preference CHECKED a Ship Doc will be shown with the quantities pre-filled.   The ship doc form looks like a packing slip which you can print and include with your shipment.

To finalize the sales cycle, click the Invoice button to generate an invoice within QuickBooks.



You can view open sales orders by opening the Sales Order List or one of the many sales order reports.   To open a sales order report, from the main menu select **Reports --> Sales Orders**. Of particular interest is the 'Pro forma sales order pick list'. This report shows sales orders that can be shipped given current available inventory.