## 2004-201a - Process Sheet (Sales Order)

## **Overview:**

The Process Sheet (Sales) guides the USER through the process steps in an ordered sequence. To access the 'Process Sheet (Sales), **click** on the Order tab in the ribbon and select the 'Process Sheet (Sales) icon.

| File      | ном             | e contacts                           | RESOURCES                                 | INVENTORY                   | QUOTES                  | PURCHASING           | ORDERS                                     | JOBS/SCH                             | EDULING I  | NVOICING                                   |
|-----------|-----------------|--------------------------------------|---|-----------------------------|-------------------------|----------------------|--|--------------------------------------|------------|--|
| New<br>Or | y Sales<br>rder | Edit Sales Order<br>Despatch (Sales) | Ristory<br>Cancel :<br>les)<br>ales Order | Sales Orders<br>Sales Order | Callup Sheet<br>(Sales) | New Factory<br>Order | Edit Factory<br>Despatch (F<br>Process She | o Order<br>Factory)<br>Fet (Factory) | Check Allo | cations<br>Production<br>tory Order<br>Ier |

**Press** <F2> and select the required Sales Order from the list and then **press** <TAB> to activate the window.

| Process Sheet (Sales)  |   |
|--|---|
| Client Order No  |   |
| <ul> <li>1. Despatch Parts (No Desp)</li> <li>2. Create Invoice(s) (0)</li> <li>3. Edit Invoice(s) (0)</li> <li>4. Print Invoice(s) (0)</li> <li>5. Send To History</li> </ul> | 1.1 New Packing<br>1.2 Edit Packing<br>Packing No |

The 1. Despatch Parts icon is active - Click on the '1. Despatch Part' icon and despatch as normal.

| Despatch Sales Order                      | Process Shee Client Order I | et (Sales)<br>No<br>50013<br>tch Parts (No Desp) | - 📀         | acking |           |          |          |                      |
|---|-----------------------------|--|-------------|--------|-----------|----------|----------|----------------------|
| Order No: Client Code:<br>50013 VOPTO-IND |                             | Shipping Address:<br>Opto Industries             |             |        | Process   |          |          |                      |
| Emp No:                                   |                             | 8 Veronica Street                                |             |        | i         |          | 📃 Return |                      |
| 12 🗸 Opto Man                             |                             |  |             |        |           | PRD      | Ord/Job: |                      |
| Desp Date:                                | 21/12/2017 📰                | CAPALABA QLD 4157                                |             |        |           | 💌 Si     | lect     | 🕑 Reset              |
| Details                                   |                             |  |             |        |           |          |          |                      |
| Select Parts to Despatch                  |                             |  |             |        |           |          |          |                      |
| Line No Tick                              | Part Code                   |  | Description |        | Order Qty | Desp Qty | On Hand  | Due Date             |
| 50013:1 FC-10002<br>50013:2 FC-2200-      |                             | Fabricated Product<br>Fabricated Product         |             |        |           |          |          | 02/02/18<br>16/01/18 |
| QK Clear Select Al                        |                             |  |             |        |           |          |          |                      |

The **2. Create Invoice(s)** icon is active and shows (1), this means there is 1 invoice to create. Also notice that the (No Desp) has now changed to (ALL). **Click** on the 2. Create Invoice(s) icon and create invoice as normal.

| Process Sheet (Sales)  | - • •   |
|--|---|
| Client Order No  | 3 🗸 🛇   |
| <ul> <li>I. Despatch Parts (ALL)</li> <li>2. Create Invoice(s) (1)</li> <li>3. Edit Invoice(s) (0)</li> <li>4. Print Invoice(s) (0)</li> <li>5. Send To History</li> </ul> | <ul> <li>1.1 New Packing</li> <li>1.2 Edit Packing</li> <li>Packing No</li> </ul> |

The USER will now notice that the 2. Create Invoice(s) icon is now greyed out and shows (0), this means there are no invoices to create. The 'Edit Invoice(s) and Print Invoice(s) icons are now active and both show (1) meaning the invoice created can be edited or printed via these icons. The invoice can also be emailed via either of these functions.

| Process Sheet (Sales)     | - • •            |
|---------------------------|------------------|
| Client Order No           |                  |
| 50013                     | <b>▼</b> ⊘       |
|                           |                  |
| 🚛 1. Despatch Parts (ALL) | 1.1 New Packing  |
|                           | 1.2 Edit Dasking |
| 2. Create Invoice(s) (0)  | 1.2 Eult Packing |
| 🛃 3. Edit Invoice(s) (1)  | Packing No       |
| 🖶 4. Print Invoice(s) (1) |                  |
| 🔮 5. Send To History      |                  |
|                           |                  |

To email the invoice via the **3. Edit Invoice** icon, **click** on the icon to open the invoice and **click** on the email button to generate the email. The invoice will be attached to an addressed email, **click** on send as normal.

| Invoice  |                  |                                      |               |                                    |                    |                                 | ×             |
|--|------------------|--------------------------------------|---------------|------------------------------------|--------------------|---------------------------------|---------------|
| Invoice No: Client Code:<br>30036 V Details More Info  | ₽ 🛛              | ]                                    |               |                                    | Invoice            | Printed/Emaile                  | d             |
| Invoice Date: Client Order No:<br>21/12/2017 987456  | Int No. Disision | Shipping Address:<br>Opto Industries |               |                                    |                    |                                 |               |
| 21/12/2017   | EC               | 8 Veronica Street                    |               |                                    |                    |                                 | ╡║            |
| 🗖 Claim 🔲 Notes 📃 Size   | 🗖 Cost 📃 Rev     | CAPALABA QLD 4157                    |               |                                    |                    |                                 | 5             |
| No         Desp         Part Code         Descrip           1         1         50013/1         FC-10002         Fabricated Product No 2           2         2         50013/1         FC-2200-555         Fabricated Product SS |                  | otion                                | Qty<br>1<br>1 | Unit Price<br>615.8125<br>450.0000 | Disc<br>.00<br>.00 | Total Price<br>615.81<br>450.00 | Tax<br>2<br>2 |



The **4. Print Invoice** Icon when selected opens to an options pane – The USER can print the single invoice or a range of invoices by selecting 1 of the radio buttons and entering the invoice range if required and then **click** on the Print button to display the preview window.

| 💷 Print Invoice(  | (s) 🗖   | - • 💌   |  |  |  |
|---|---------|---------|--|--|--|
| <ul> <li>Print a Single Invoice</li> <li>Print Range of Invoices</li> </ul> |         |         |  |  |  |
| Invoice No:   | 30036   | •       |  |  |  |
| Invoice To:   |         | •       |  |  |  |
|   | 🖶 Print | 💟 Email |  |  |  |

**5. Send to History** function is password protected, so the USER will need a special password. Enter the password and **press** <TAB> *twice* to active the window and **click** on *Send* and then **click** on Finish.

| Process Sheet (Sales)  |   |
|--|---|
| Client Order No  | - 0   |
| <ul> <li>I. Despatch Parts (ALL)</li> <li>2. Create Invoice(s) (0)</li> <li>3. Edit Invoice(s) (1)</li> <li>4. Print Invoice(s) (1)</li> <li>5. Send To History</li> </ul> | History Job Client  Employee Password  Order No  Send  Finish |

