




Sales Order - Products

Usage

The sales order function allows sales person to create a sale invoice when the product is not available in stock. This function is useful for those companies that order items on consignment. The function also allows collection of deposit payment for products being sold.

When the barcode is scanned, the system displays a message informing the item does not exist, to continue the user is offered to select options to continue with the sale. The following options are presented to the user.

	1. Transfer Request. Where the stock may be available in other stores, user can continue to make sale and request the transfer of stock from the choice of branches.
	2. Reserve stock on an existing Purchase order If there is a Purchase Order that is awaiting delivery, the Product can be Reserved for the customer.
	3. Create a New purchase order And finally, the user may choose to Create a New purchase order for the item being sold.

All three options are tracked until it is delivered to the store.

Getting started

User group permissions

In order to use this option you need to change user group permission to allow user group to continue with the sale. The following needs to be ticked.

1.10.190 Allow user to sell Product if not in Stock

1.10.195 Allow user to create sales order

1.10.197 Allow user to reserve orders from a Different Branch - Optional

If you do not tick the options, then user cannot continue with the sale. That is, user cannot sell if product is not in stock.

Build Stock Status

You are required to add a new Stock Status that will identify a stock item that is being reserved for a customer. That is, if you reserve or order a product for a customer, then the item cannot be sold to any other customer. You must add the Status as it is spelled below. To add stock status go to

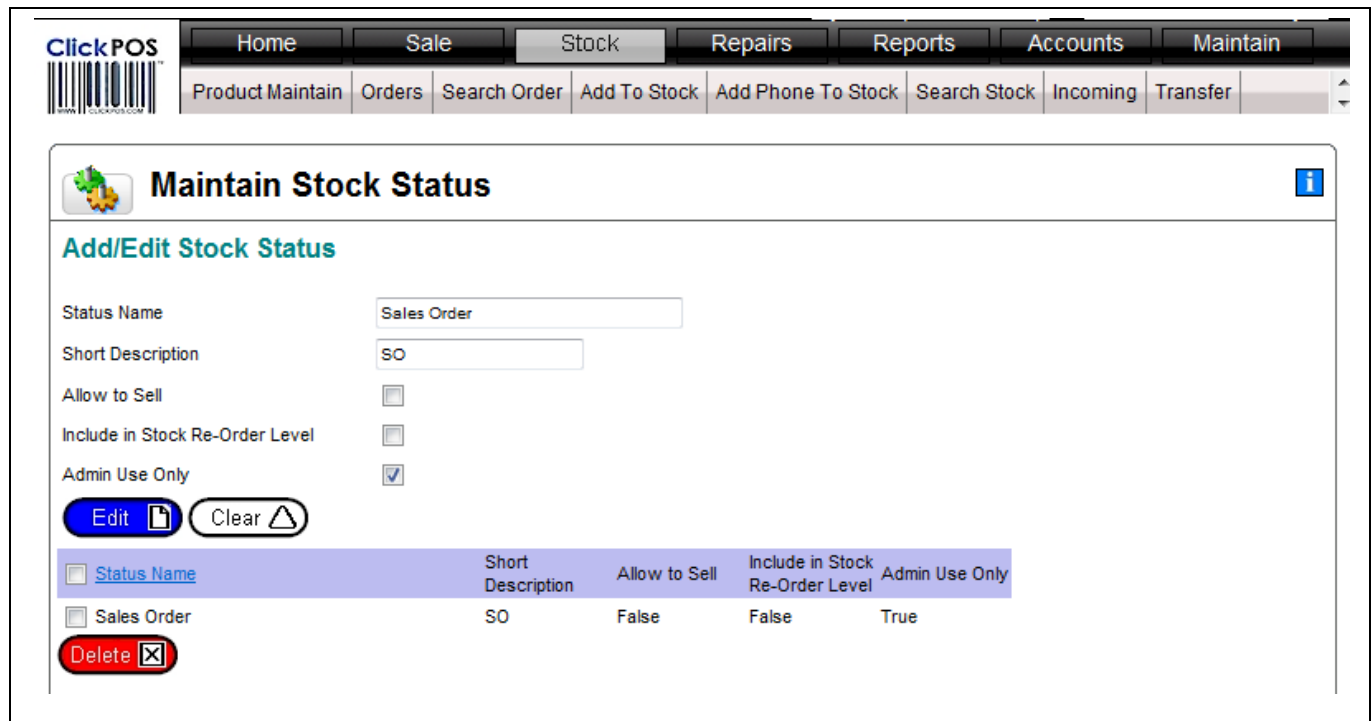
Stock | Search Stock | click on any barcode to Edit stock

In Edit screen, click on **"Status Maintenance"**

Then add **"Sales Order"**

Short Description **"SO"**

Tick, **"Admin Use Only"**

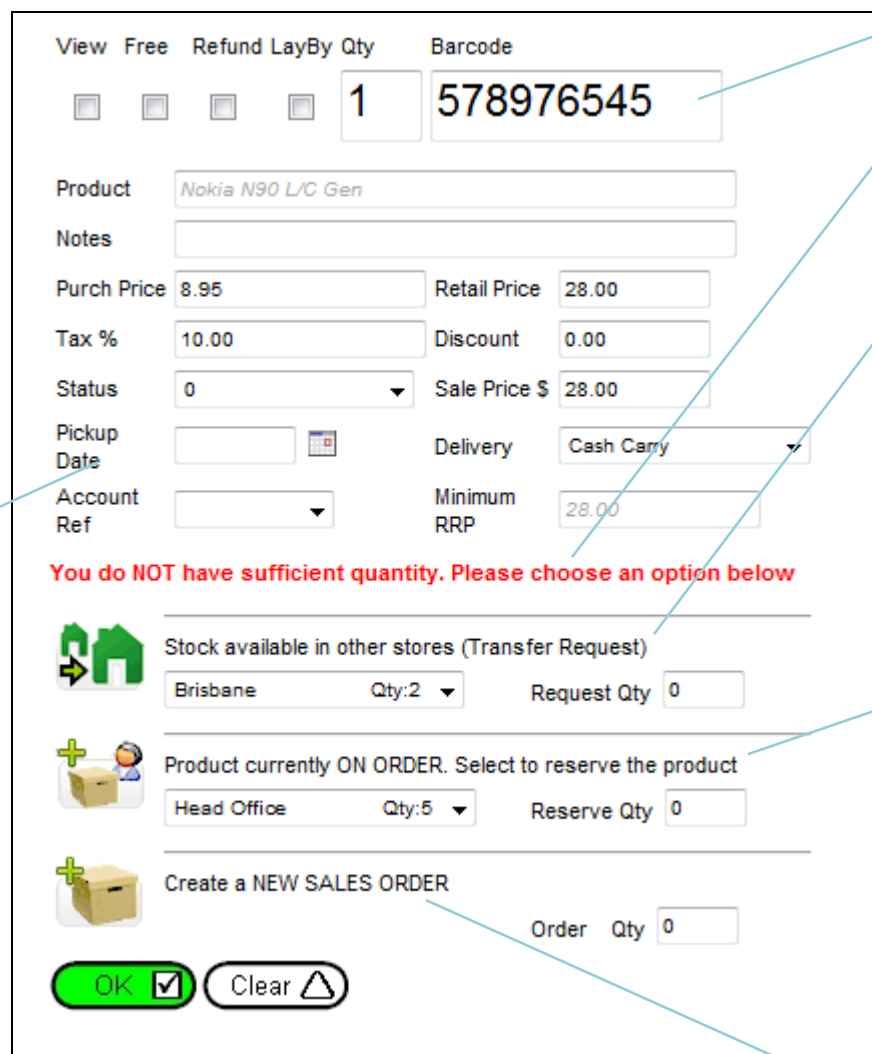


Status Name	Short Description	Allow to Sell	Include in Stock Re-Order Level	Admin Use Only
Sales Order	SO	False	False	True

The Sale process

The sales order function allows sales person to create a sale invoice when the product is not available in stock. When the barcode is scanned, the system displays a message informing the item does not exist, to continue with the sale, user is offered to select up to 3 options. Depending on the availability of the product the number of options may vary. Here is a screen shot of the 3 options that could be available.

Sale | Sell Product



Scan the barcode

The product is NOT available in this branch and the product exists in catalogue. Enter quantity in one or all 3 options available.

Transfer Request

Stock available in other stores. This option displays only if you operate multiple stores, and the product is available. Branch and Quantity. Select the Branch to RESERVE this item from, then enter the Request Quantity. You cannot order > quantity available.

Reserve product on Purchase Order.

This product is currently on order and is awaiting delivery. You have the option of Reserving the item for the customer. Branch and quantity displays which branch the order will go to, and Quantity being ordered. Simply select the branch you want to reserve, and the Reserve Quantity.

Create a new Purchase Order.

By entering a quantity, a new Purchase Order is created for this customer. The new order will use the default attributes set in product catalogue, that is, it will assign the supplier, buy price. The stock control team must open the Purchase order to make changes and forward the order to the supplier.

You may enter an optional pickup date when customer will collect the goods

FYI – additional notes.

You can add quantity in each option in one hit. Eg. If you're selling Qty of 10 items and 3 is available in other branches, you can enter 3 for Transfer request, and 7 into New orders, then click the OK button

What happens after selection?

The process that needs to be followed for each option is explained below.

Option 1

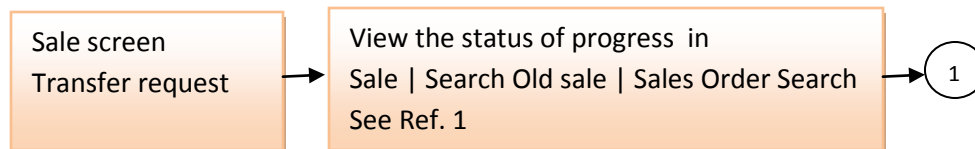


Transfer Request

Below is a diagram that explains the process. In this example, Head Office branch makes a sale of a product that is not on hand, however is available in Brisbane branch, so continue to sell the product and request a stock transfer at the same time.

At Head Office branch

When a transfer request is selected, the system reserves the product so it cannot be sold. You are required to contact the branch and notify that you have reserved the product and the branch needs to approve it within the Transfer Stock screen



Ref. 1.

You may view the progress of your transfer request by going into **Sale | Search Old sale | Sales Order Search**, which displays the item being requested.



Sale Search

Sales order Search

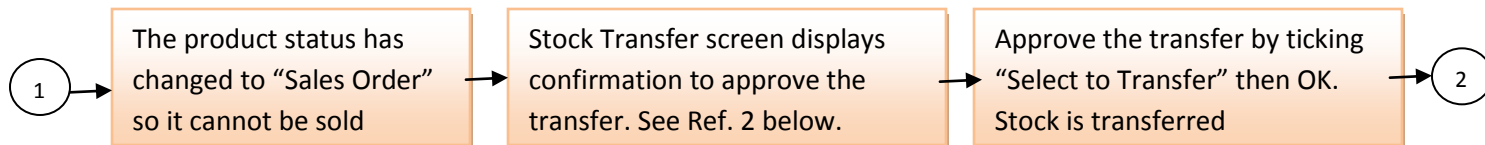
From 11/05/2011 To 11/05/2011

Invoice No.	Sale by	Sale Date	Product Name	Quantity	Customer	Tel	Pickup Date	PO NO.	Action by	Sale Status	Delivery	Finalise Sale
1002013	Head Office	11/05/2011	Nokia N90 L/C Gen	1	John Johnson	0755350299			Brisbane	Stock Transfer Request	Cash Carry	Amount due

The Sale Status displays,
"Stock Transfer Request"

"Amount Due" which
means, customer needs to
pay when picking up goods.

At Brisbane branch



Ref. 2

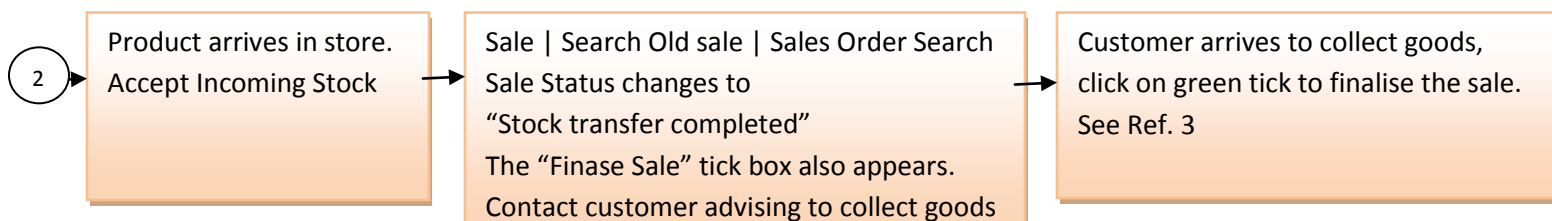
In this example, the following product was requested by Head office branch, from Brisbane branch. The Brisbane branch's **Stock | Transfer Stock** screen will display the following details

 Transfer Stock To Another Branch							
Transfer Requests							
Branch Requesting	Barcode	Product Name	Request Invoice No.	Quantity	Select to Transfer	Deny	
Head Office	578976545	Nokia N90 L/C Gen	1002013	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

The Brisbane user needs to select one of two options


1. If OK to transfer, simply tick the "Select to Transfer" then click OK button.
Then pack the goods and ship to the branch requesting the product. Or
2. Click the "Deny" option. This will reverse the Status of being reserved.
If denied, notify the requesting branch that request is denied. See Ref. 4 for more information.

At Head Office branch, if approved and transferred



Ref. 3.

Sale | Search Old sale | Sales Order Search, When customer arrives to collect goods, simply click the "Finalise Sale" image. The sale screen will display, select the payment method to produce a final receipt for the customer.

 Sale Search													
Sales order Search													
From 11/05/2011 To 11/05/2011													
Invoice No.	Sale by	Sale Date	Product Name	Quantity	Customer	Tel	Pickup Date	PO NO.	Action by	Sale Status	Delivery	Finalise Sale	
1002013	Head Office	11/05/2011	Nokia N90 L/C Gen	1	John Johnson	0755350299			Head Office	Stock Transfer Completed	Cash Carry	<input checked="" type="checkbox"/>	Amount due

The Sale Status displays, "Stock Transfer Request"

When customer arrives to collect goods. Click the Finalise Sale to complete the sale. It will link back to original sale screen, so you can tender outstanding payment.

Transfer Request Denied

At the Brisbane branch.

If the Branch denies the transfer for any reason, contact the requestor, advising that the request is denied. To deny the transfer, simply go to

Stock | Transfer Stock | then click on the  red icon



The request line disappears and the status of stock changes from “Sales Order” to default. Which means it is available for sale.

At the Head Office branch

You are required to go to


Sale | Search Old sale | Sales Order Search

identify the product and note that the status has changed to “Stock Transfer Denied”.

 Sale Search													
Sales order Search													
From 11/05/2011 To 11/05/2011													
Invoice No.	Sale by	Sale Date	Product Name	Quantity	Customer	Tel	Pickup Date	PO NO.	Action by	Sale Status	Delivery	Finalise Sale	
1002014	Head Office	11/05/2011	Nokia N90 L/C Gen	1	John Cole					Stock Transfer Denied	Cash Carry		Amount due

The Sale Status displays, “Stock Transfer Denied”

The Finalise sale button changes to the Edit mode. Simply click the Edit button, which takes you back to sale screen. Then delete the product, and start over by scanning the same product and choose another option to supply the product to the customer.

Click on the  Edit button. You will now see the Sale screen for this invoice.

Identify the product and **DELETE it from Sale**. If you do not have permission, ask a supervisor to assist. The deletion does not add product back to stock, system knows the product already exists.

Now you need sell the product again, so this product can be supplied to the customer.

In sale screen, once you enter the barcode, , the same options will appear, If product is available in another store, you may select another transfer request, or simply choose option to Create a New Purchase Order.

Option 2




Reserve a product on order

The second option allows you to reserve products that may already be on an existing Purchase Order. In the example below, the item being sold does not exist in stock, however there is a purchase order of 5 items. So we will reserve one of those items for this customer.

Select the branch you want to reserve from. We recommend you select the branch where sale is made. If not available then select the nearest branch to your store. Please comply with your companies recommended process.

Sale | Sell Product



Product currently ON ORDER. Select to reserve the product

Head Office

Qty: 5 ▼

Reserve Qty 0

Displays a list of stores where Purchase Orders are made for this product, and the Quantity on order.

Enter the quantity to reserve. Note that you cannot order more than quantity being sold.

Tracking the product

There are several screens you can use to track the progress of the delivery.

Sale | Search Old Sale | Sales Order Search

You can track the progress of the delivery by viewing the **Sale | Search Old Sale | Sales Order Search**



Sale Search



Sales order Search

From 11/05/2011 To 11/05/2011

Invoice No.	Sale by	Sale Date	Product Name	Quantity	Customer	Tel	Pickup Date	PO NO.	Action by	Sale Status	Delivery	Finalise Sale
1002015	Head Office	11/05/2011	Nokia N90 L/C Gen	1	John Johnson	0755350299		10098	Head Office	Order Reserve Request	Cash Carry	Amount due

The Purchase Order number is identified

The status displays "Order Reserve request".



You may also see the progress in Purchase Order page.

Stock | Purchase Orders

Purchase Order - 10098

Main Wizard **Current Order**

Current Orders

ID	Sup.Prod.Code	Type	Branch	Ex Tax Unit Price	Purchase price \$	Sale Price \$	Qty	Total Purch Price	
412	NN90LC	Nokia N90 L/C Gen	Head Office	8.14	8.95	28.00	4	35.80	
413	NN90LC	Nokia N90 L/C Gen	Head Office	8.14	8.95	28.00	1	8.95	Reserved by Invoice #1002015 ,Cash Carry

Please note that the original order was in 1 record, that is Qty = 5. Now the record is split into 2. This is necessary to identify one item reserved for a customer.

A note is displayed to identify the invoice number this item belongs to.

When stock arrives

When the delivery arrives, before accepting the goods into stock, we recommend you click the **Print SOLD** option and attach it to the product, to identify that item is reserved.

Then accept the goods into stock as per usual. Remember that this item cannot be sold to another customer as its status will be assigned as a "Sales Order"

Stock | Incoming | Incoming Purchase Orders

Incoming Stock

Order ID: [10098](#) Ordered By: Head Office Ordered Date: 11/05/2011 Required By: 12/05/2011 Approved: False Sent to Supplier: False

Description	Barcode	Sup.Prod.Code	Ord. Qty	Rec.Qty	Tot Qty Received	Unit Price	Total Products Recieved	Tick	
Nokia N90 L/C Gen	578976545	NN90LC	1	0	0	\$8.95	\$8.95	<input type="checkbox"/>	Add Manually
Notes: Reserved by Invoice #1002015 ,Cash Carry Print SOLD									
Nokia N90 L/C Gen	578976545	NN90LC	4	0	0	\$8.95	\$35.80	<input type="checkbox"/>	Add Manually
Total									

A note is displayed to identify the invoice number this item belongs to.

Click Print SOLD, to attach it to the product.

SOLD

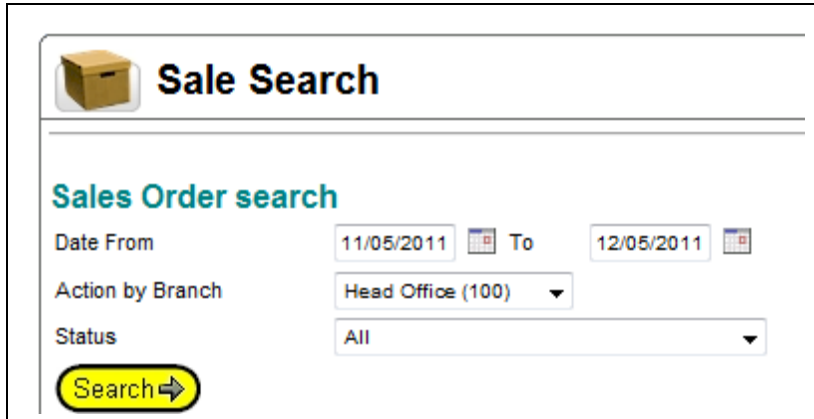
Pickup Date: 11/05/2011
 Invoice Number: 1002015
 Barcode: 578976545
 Product Name: Nokia N90 L/C Gen

Customer Name: John Johnson
 Telephone: 0755977777

Finalise the Sale


Now you are ready to finalise the sale. Go to **Sale | Search Old Sale | Sales Order Search**

Enter the dates when the goods were sold, and select your branch. You may refine the search by selecting a status, or simply leave it as the default which is "All"



The list will display the products ready to be handed over to the customers.

Contact the customer advising their goods have arrived.

When the customer arrives to collect the goods, simply click on the  Finalise sale icon
Note that in this instance there is an outstanding amount, so don't forget to collect the remaining balance from customer.

Sale Search											
Sales order Search											
From 11/05/2011 To 12/05/2011											
Invoice No.	Sale by	Sale Date	Product Name	Quantity	Customer	Tel	Pickup Date	PO NO.	Action by	Sale Status	Finalise Sale
1002015	Head Office	11/05/2011	Nokia N90 L/C Gen	1	John Johnson	0755350299		10098	Head Office	Order Reserve Completed	
										Cash Carry	Amount due

The status displays "Order Reserve Completed".

Click on the Finalise Sale icon to link back to sale to complete the sale.

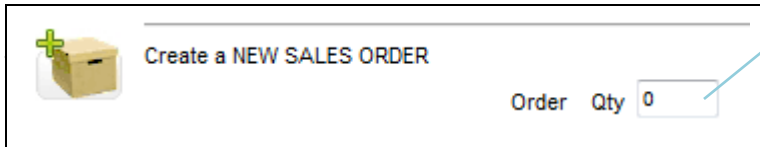
Option 3



Create a purchase order

As mentioned above, simply enter the quantity in the Order Qty box, then click OK. Finalise the sale by taking a deposit. Please make sure to enter the Customer details.

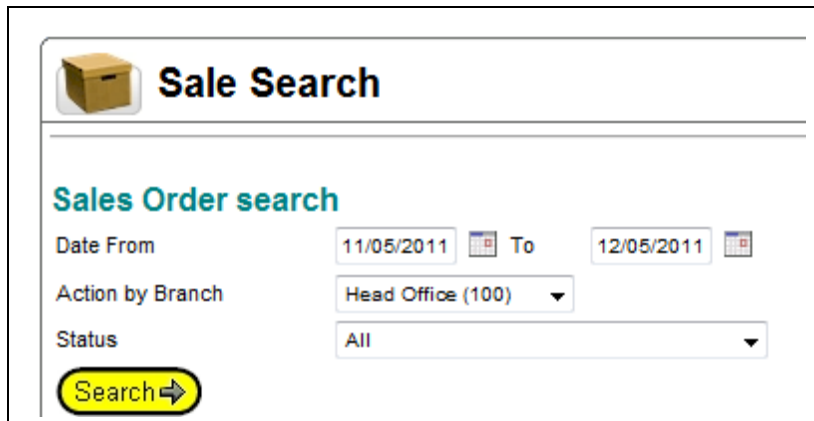
The item is now included in a purchase order.



To create a new Purchase Order simply enter the quantity to order and OK.

Tracking the product

You may track the progress of the delivery via **Sale | Search Old Sale | Sales Order Search**




Sale Search									
1002021	Head Office	12/05/2011	Nokia N90 L/C Gen	1	John Smith	100100	Head Office	New Order Create	Cash Carry

The Purchase Order number this product is assigned to.

The status displays “New Order- Create”, and identifies which PO number this product is assigned to.

The Purchase Order

When the Item is added to the purchase order, the system first looks for any OPEN orders. If there is an Existing Purchase Order that is OPEN, then system will add the new item into this existing order. This avoids creating many new purchase orders and simply appends the products for the SAME supplier until the order is CLOSED. So please be aware that as soon as you send PO's to the supplier, you should CLOSE it or change APPROVED to YES.



If status of order is OPEN, then any new Sales Orders will be appended to the existing purchase order. So each time you send PO to suppliers please CLOSE the order by either selecting Yes on Approved, or change status from Open to Closed.

If there are no open orders, a New Purchase Order is created, containing the default supplier; buy price and delivery address set to the branch selling the product.

Please note that you are required to forward the purchase order to the Supplier.

When stock arrives

When the delivery arrives, before accepting the goods into stock, we recommend you click the **Print SOLD** option and attach it to the product, to identify that item is reserved.

Then accept the goods into stock as per usual. Remember that this item cannot be sold to another customer as its status will be assigned as a "Sales Order"

Stock | Incoming | Incoming Purchase Orders



Incoming Stock

Order ID: [100100](#) Ordered By: Head Office Ordered Date: 12/05/2011 Required By: 15/05/2011 Approved: False Sent to Supplier: False

Description	Barcode	Sup.Prod.Code	Ord. Qty	Rec. Qty	Tot Qty Received	Unit Price	Total	Tick Products Recieved	
Nokia N90 L/C Gen	578976545	NN90LC	1	0	0	\$8.95	\$8.95	<input type="checkbox"/>	Add Manually
Notes: Reserved by Invoice #1002021 ,Cash Carry Print SOLD									
Total			1		0		\$8.95		


Finalise the Sale

Now you are ready to finalise the sale. Go to **Sale | Search Old Sale | Sales Order Search**

Enter the dates when the goods were sold, and select your branch. You may refine the search by selecting a status, or simply leave it as the default which is "All"

The list will display the products ready to be handed over to the customers.

Contact the customer advising their goods have arrived.

When the customer arrives to collect the goods, simply click on the  Finalise sale icon



NOTES.

Deleting after sale is created.

You can delete the Product once it is sold. All entries will be reversed.

Purchase price

If you Created the sales order, the system takes the default purchase price from the product catalog. Once the product is delivered and accepted into stock, and Finalise Sale is ticked, the Actual purchase price is written over the original price.

Status explanation

Here are the Status' in detail **Sale | Search Old Sale | Sale Status Search**

Each stage of action changes automatically to reflect to the current status. The status details are hardcoded and cannot be changed.

Status: Stock Transfer	Explanation
All	List all regardless of status
Stock Transfer Request	Assigned when stock is being asked to be transferred
Stock Transfer Incoming	The transfer is approved and is now visible in Incoming stock screen. Action : Go to incoming Stock screen and Accept incoming stock.
Stock Transfer Completed	Incoming stock is accepted, ready for sale. At this stage you will see the Green icon to complete the sale. Contact customer to advise goods are ready for pickup.
Stock Transfer Denied	The request to transfer has been denied by the branch holding the stock. Follow the instructions in this guide for further action.
Status: Stock Reserve	Explanation
All	List all regardless of status
Order Reserve Request	Assigned when stock is being Reserved in an existing Purchase Order.
Order Reserve Stock Transfer Request	Applies when the Reserve was made on another Branches Purchase Order. When phone is accepted into stock, the stock automatically assigns the phone as a Transfer request. Action : the branch accepting incoming stock must view the Transfer Stock screen and accept and deliver the product to the requesting branch.
Order Reserve Stock Transfer Incoming	The transfer is approved and is now visible in Incoming stock screen. Action : Go to incoming Stock screen and Accept incoming stock.
Order Reserve Stock Transfer Completed	Incoming stock is accepted, ready for sale. At this stage you will see the Green icon to complete the sale. Contact customer to advise goods are ready for pickup.
Order Reserve Stock Transfer Denied	The request to transfer has been denied by the branch holding the stock. Follow the instructions in this guide for further action.
Order Reserve Completed	Incoming stock is accepted, ready for sale. At this stage you will see the Green icon to complete the sale. Contact customer to advise goods are ready for pickup.
Status: Purchase Order	Explanation
All	List all regardless of status
New Order Create	Assigned when Purchase order is created via Sales Order.
New Order Completed	Completed means that the item is ready for sale. At this stage you will see the Green icon to complete the sale. Contact customer to advise goods are ready for pickup. When customer arrives, click the Green Icon to complete the sale.