

# Sales Orders (Detail)

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# Summary

The Sales Order Detail page displays all of the information relevant to the Sales Order, allows the user to process it, add notes, manage payments, etc.

## Page Breakdown

This is one of the most complex pages within IXO Commerce. Below is a breakdown of the key sections.

- [Order Number](#)
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The screenshot shows the IXO Commerce Sales Order Detail page with several key sections highlighted in blue boxes:

- Order Number**: Located at the top left of the page.
- Order Status**: A horizontal bar at the top right with tabs for 'Order Status', 'Process Payments', and 'Status Management'.
- Order Details**: A tab on the left side of the top navigation bar.
- Process Payments**: A tab on the right side of the top navigation bar.
- Status Management**: A tab on the far right of the top navigation bar.
- Existing Payments**: A section below the top navigation bar.
- Customer Details**: A section containing fields for Billing Address, Delivery Address, and other customer information.
- Delivery Information**: A section containing fields for Delivery Address, Delivery Date, and other delivery-related information.
- Order Products**: A table listing the items in the order.
- Process Order Lines**: A section for managing the order lines.
- Discount Management**: A section for applying discounts to the order.
- Delivery Management**: A section for managing the delivery process.
- Loyalty**: A section for applying loyalty points to the order.
- Balance**: A section showing the current balance of the order.
- Order Notes**: A section for adding notes to the order.
- Audit History**: A section for viewing the order's audit trail.
- Quick Access Buttons**: A section with buttons for 'Print all warehouse labels', 'Reprint order email', and 'Send email receipt'.

## FAQs

Is it possible to cancel a payment, e.g. if a user has entered it incorrectly, or in error?

A Superuser can cancel a payment on the same day it was added to the system. See [here](#) for more information.

# Order Number



The Sales Order number is a sequential number.

This is automated.

# Order Status



The Order Status is set automatically based on a variety of things within the Sales Order.

These can be used to filter the list of Sales Orders.

## A List of Statuses

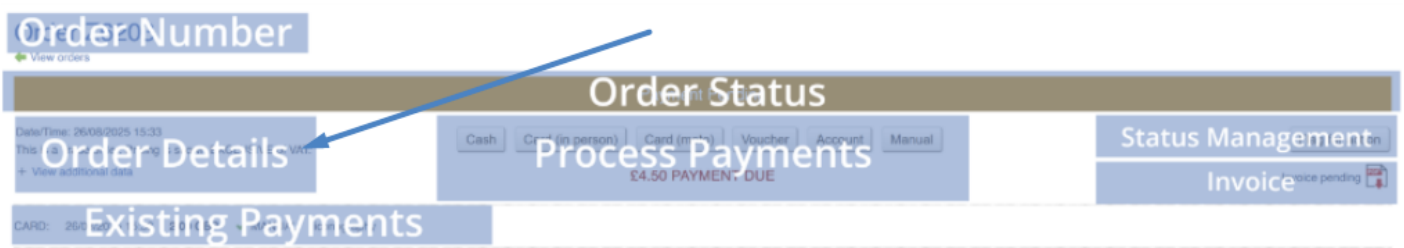
These statuses have an impact on the function of the system. For example, it may be impossible to Pack or Despatch a Sales Order which is Payment Pending, or process a return for an Abandoned Sales Order.

Status	Purpose
Draft	<i>This implies that an order is still being created or edited and is not yet active.</i>
Payment Pending	<i>This flags an outstanding balance on an order.</i>
Unallocated	<i>This flags that no stock has yet been <a href="#">allocated</a> to the Sales Order</i> <div style="border: 1px solid #0070C0; background-color: #E6F2FF; padding: 5px; margin-top: 10px;"><i>Unallocated orders may be auto-allocated, and will appear on the Required Orders screen</i></div>
On Order	<i>This will be set if at least on line on the Sales Order is allocated to an active <a href="#">Purchase Order</a></i>
On Transfer	<i>This will be set if at least on line on the Sales Order is allocated to an active <a href="#">Stock Transfer</a></i>

Status	Purpose
Awaiting Packing	<i>Set if all items are allocated to Stock Locations with free stock, which are also enabled for fulfilment</i>
Awaiting Despatch	<i>Set if all items are marked as Packed</i>
Awaiting Collection	<i>Set if all items are marked as Packed and the delivery type is 'Collect'</i>
Partially Despatched	<i>Set if at least one order line has been marked as Despatched</i>
Partially Collected	<i>Set if at least one order line has been marked as Collected</i>
Completed	<p><i>Set if all order lines have been marked as Despatched/Collected, and there is no outstanding payment</i></p> <p><i>May be overridden by Awaiting Action</i></p>
Awaiting Action	<p><i>This will be set if there is a problem with the Sale Order</i></p> <p><i>Some potential reasons include (but are not limited to):</i></p> <ul style="list-style-type: none"> <li><i>• Manual interaction</i></li> <li><i>• Outstanding balance after delivery</i></li> <li><i>• Integration problems</i></li> </ul> <p><i>It may be set and must be cleared <a href="#">manually</a></i></p>
Refund Pending	<i>Set if a refund needs to be paid to the customer</i>
Returned	<i>Set if all line items have been Returned</i>
Partially Returned	<i>Set if at least one line item has been Returned</i>
Cancelled	<p><i>Set if all lines have been Cancelled prior to delivery</i></p> <p><i>Alternatively, set if an eCommerce customer clicks 'pay', and then actively choose to cancel within the payment gateway; in this instance, a cancelled payment will be logged against the Sales Order</i></p>
Abandoned	<i>An Abandoned Sales Order is created when the eCommerce customer clicks 'pay', but fails to complete payment within the payment gateway</i>
Quote	<i>Created by a User within IXO Commerce, typically within the POS</i>

Occasionally it may be possible for a Sales Order to fall into multiple statuses (e.g. one order line is On Order and another is On Transfer); because each Sales Order can only have a single status, IXO Commerce will prioritise the most important.

# Order Details

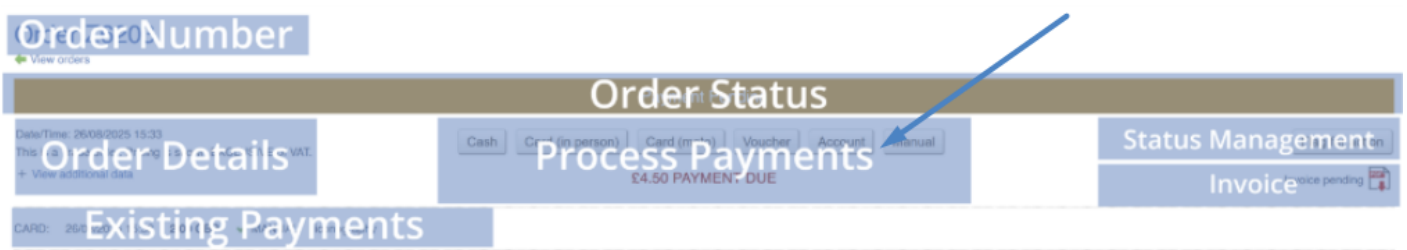


This section shows key information about the Sales Order, including:

Field	Purpose
Date/Time	<i>Date and time the Sales Order was created</i>
Order Type	<i>Retail or Trade</i>
VAT Type	<i>How VAT should be applied to pricing (inclusive/exclusive)</i>
Source	<i>Sources include:</i> <ul style="list-style-type: none"><li>• {website}</li><li>• Phone</li><li>• Store</li><li>• Retail/Trade</li><li>• Quote</li><li>• {marketplace}</li></ul> <p><i>There could be multiple Stores and Marketplaces</i></p>
Store	<i>The selling store (if applicable)</i>
Created by	<i>The User who created the order (if applicable)</i>
Campaign Code	<i>Marketing campaign code; this may be set manually in the POS, or automatically from Google Ads campaigns for eCommerce Sales Orders</i>
Mark as High Priority	<i>Use this to prioritise this Sales Order in Stock Allocation from Purchase Orders</i>

Field	Purpose
Mark as acknowledged	<p data-bbox="810 197 1469 293"><i>This will show whether a third party system has acknowledged the Sales Order; uncheck this to return the Sales Order to the feed</i></p> <div data-bbox="815 327 1485 421" style="background-color: #e0f2f7; padding: 5px;"><p data-bbox="879 365 1347 398"><i>Only required for <a href="#">third party integrations</a></i></p></div>
Order Margin	<p data-bbox="810 461 1347 495"><i>This displays the Sales Order <a href="#">margin</a> (if known)</i></p>

# Process Payments



Use this section to add Payments to the Sales Order.

Available Payment Types will be visible here.

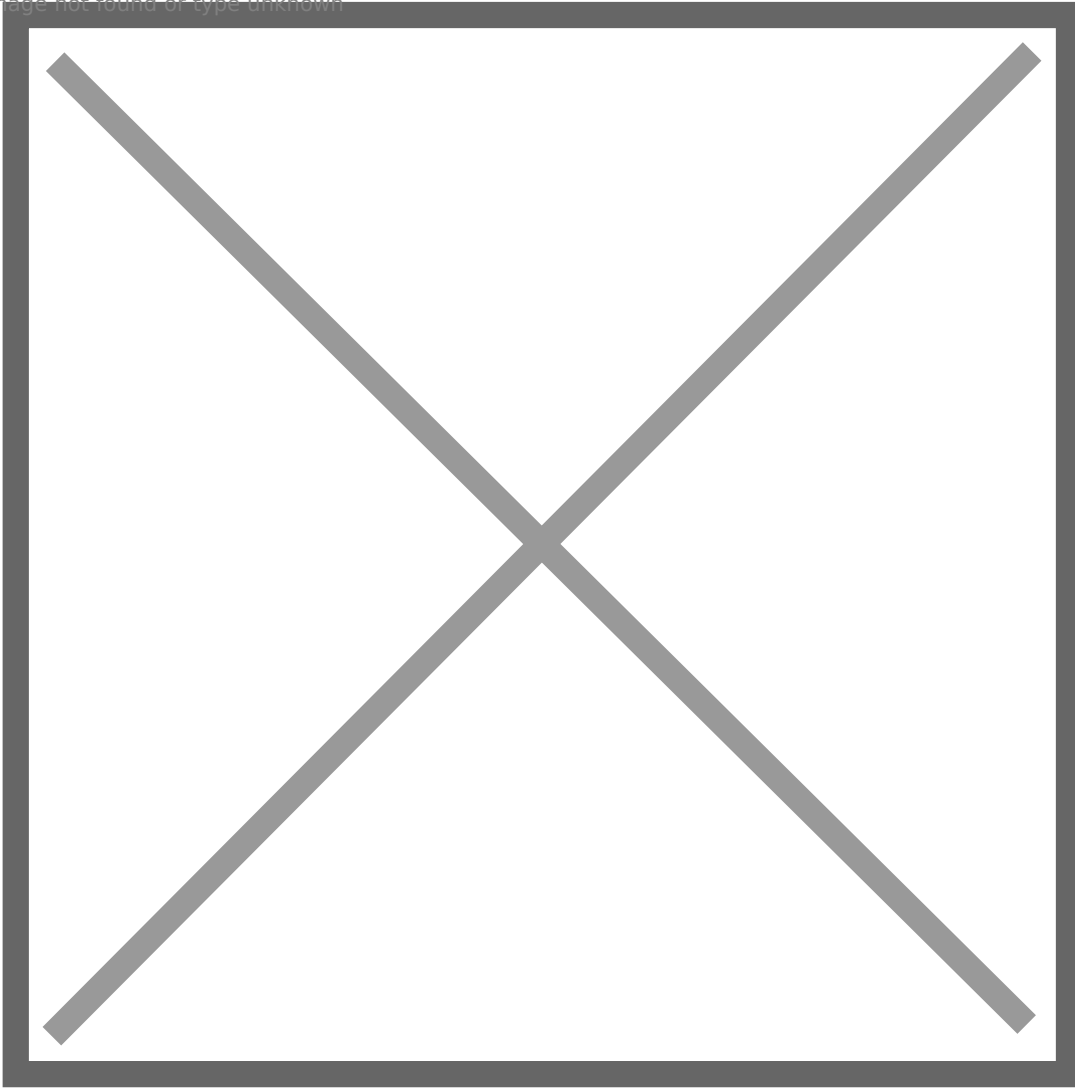
If you need to finalise a PENDING payment, you will need to manage [Existing Payments](#)

## How to Add a Payment

Different payment types may have different payment flows, up to and include virtual terminals

1. Select the payment that you wish to add, and click the relevant button

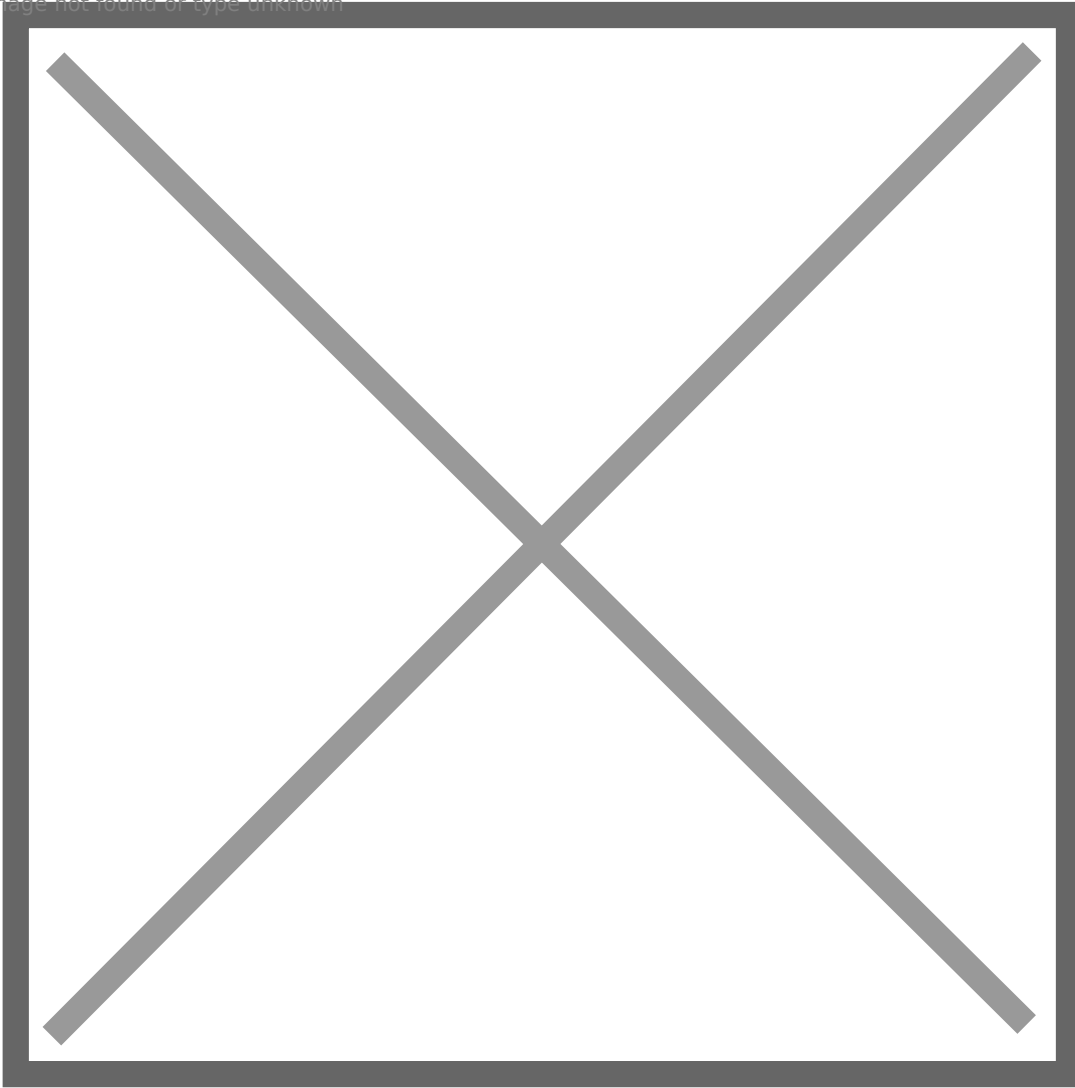
Image not found or type unknown



2. Confirm payment amount (defaults to full amount)

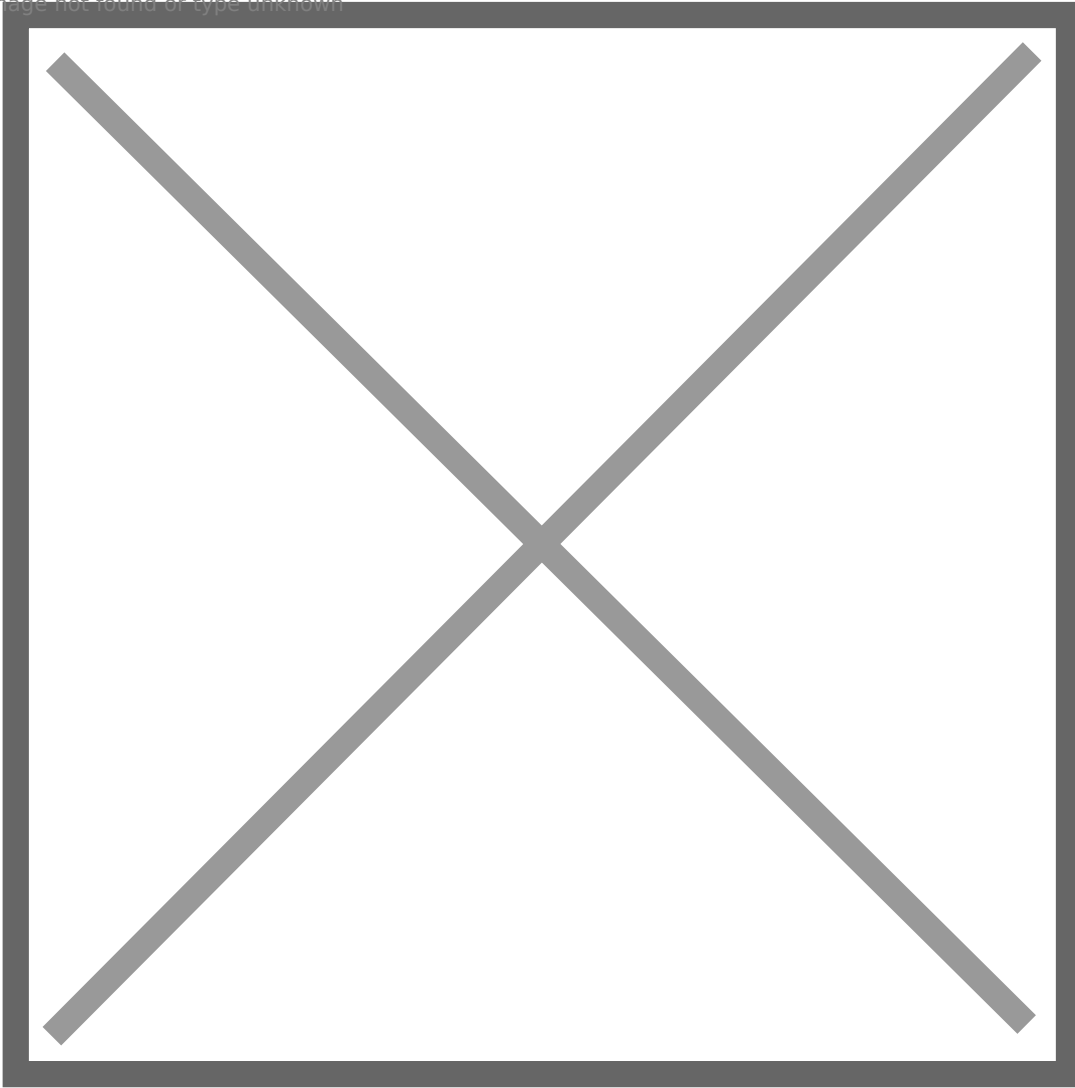
3. For the 'Manual' payment , choose a payment type from the drop down

Image not found or type unknown



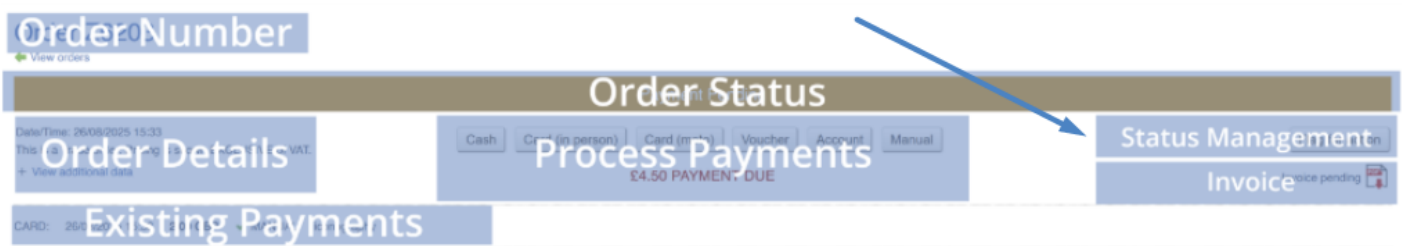
4. Enter a reference if required (this will be automated for some payment types)

Image not found or type unknown



5. Click to acknowledge or confirm payment

# Status Management



Status management may be used to adjust the status of a Sales Order. It's use is limited as most statuses are [automated](#) based on various factors.

## Possible Actions

Field	Purpose
Convert to Order	<p><i>This will change the status of the Sales Order to Payment Pending</i></p> <div style="border-left: 2px solid orange; padding-left: 10px; margin: 10px 0;"> <p><i>It is possible to use this to create a Sales Order without any payment</i></p> </div> <p><i>This button will only appear on Sales Orders with the Draft and Quote statuses</i></p>
Convert to Quote	<p><i>This will change the status of the Sales Order to Quote</i></p> <p><i>This will created a quote reference, but will not automatically email the customer with the Retrieve a Quote email; to send this, use the <a href="#">Quick Access Buttons</a></i></p> <p><i>This button will only appear on Sales Orders with the Draft and Abandoned statuses</i></p>
Flag for Action	<p><i>This will change the order status to Awaiting Action</i></p> <p><i>This button is always visible</i></p>

# Invoice

The screenshot shows a software interface for an invoice. At the top left, there is a section for 'Order Number' with a 'View orders' link. Below this is a central banner for 'Order Status' containing buttons for 'Process Payments' and 'Status Management'. To the left of the banner is the 'Order Details' section, which includes a date/time stamp, a VAT indicator, and a 'View additional data' link. Below 'Order Details' is the 'Existing Payments' section. At the bottom of the interface is the 'Customer Details' section, which includes 'Trade Customer' information, 'Billing Address' fields, and 'Delivery Address' fields. A blue arrow points from the 'Invoice' button in the 'Status Management' section to the 'Invoice' text in the 'Customer Details' section.

The invoice section allows you to review paperwork for the Sales Order.

If the document has previously been downloaded, it will be labelled as such

Although on Sales Orders with the status Quote, this will read 'Quote Pending', the document is almost identical

# Existing Payments



A list of existing payments will be shown here, along with any relevant information, including date/timestamps, payment methods and references.

## PENDING Payments

Certain payment types (Finance and Other by default) require secondary confirmation; this is because it is expected that although the order is 'paid', further action will be required to complete that payment. This is intended as a flag for manual action outside of IXO Commerce, such as cooling of a finance agreement.

For the purposes of order processing, a Sales Order with a PENDING payment is considered to be paid.

Once the Sales Order has been delivered, its status will be set to Awaiting Action, and a message will be shown:

This order requires action. Payment requires confirmation.

Use the controls to confirm or cancel finance; this will automatically reset the status.

## Refunds

It may be possible to refund payments for certain payment types; this function is available for eCommerce payments processed via the Opayo Pi integration, for example.

## Cancelling Payments

This should only be done to correct errors

Payments may be cancelled by superusers, but only on the same day that they were added. They may not be cancelled at a later date, as this would affect payment reporting, and may enable malicious activity.

In order to cancel a payment, the user must have superuser access rights, and the payment must either be a 'Manual' or 'Cash' payment. To cancel the payment, simply press the relevant button:

CARD: 01/12/2025 16:19 0.05 GBP ✓ MANUAL iconography

Cancel payment

CASH: 01/12/2025 16:19 0.02 GBP ✓ MANUAL iconography

Cancel payment

This will then alter the Sales Order:

CARD: 01/12/2025 16:19 0.05 GBP ✗ CANCELLED iconography

CASH: 01/12/2025 16:19 0.02 GBP ✓ MANUAL iconography

The user is then free to add further payments as required.

Cancelled payments are discounted from all payment reporting

# Customer Details

CARD: 26 Existing Payments

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Customer Details

Trade Customer: [Mr Mike Whitman](#) Email: [mike.whitman@iconography.co.uk](mailto:mike.whitman@iconography.co.uk) Telephone: 01321657967 Device: CMS Price List: [Trade price list](#)

Billing Address:

Mr Mike Whitman

Avalon, Ashwell Park

Ashwell

Ilminster

Somerset

TA19 9DX

United Kingdom

Delivery Address:

Work

Iconography Ltd

Avalon, Ashwell Park, Ashwell

Ilminster

Somerset

TA19 9DX

United Kingdom

Same as billing

Update

Order Details

This section can be used to amend the customer details. Some details can only be edited as part of the Customer record.

Click on the customer name hyperlink to open the [Customer](#) record

# Delivery Information

CARD: 260 Existing Payments

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Customer Details

Trade Customer: Mr Mike Whitman Email: mike.whitman@iconography.co.uk Telephone: 01321657967 Device: CMS Price List: trade price list

Billing Address:

Mr Mike Whitman

Avalon, Ashwell Park

Ashwell

Ilminster

Somerset

TA19 9DX

United Kingdom

Customer Details

Delivery Address:

Work

Iconography Ltd

Avalon, Ashwell Park, Ashwell

Ilminster

Somerset

TA19 9DX

United Kingdom

Delivery Information

Same as billing

Update

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Order Details

Edit delivery information here.

## Same as billing

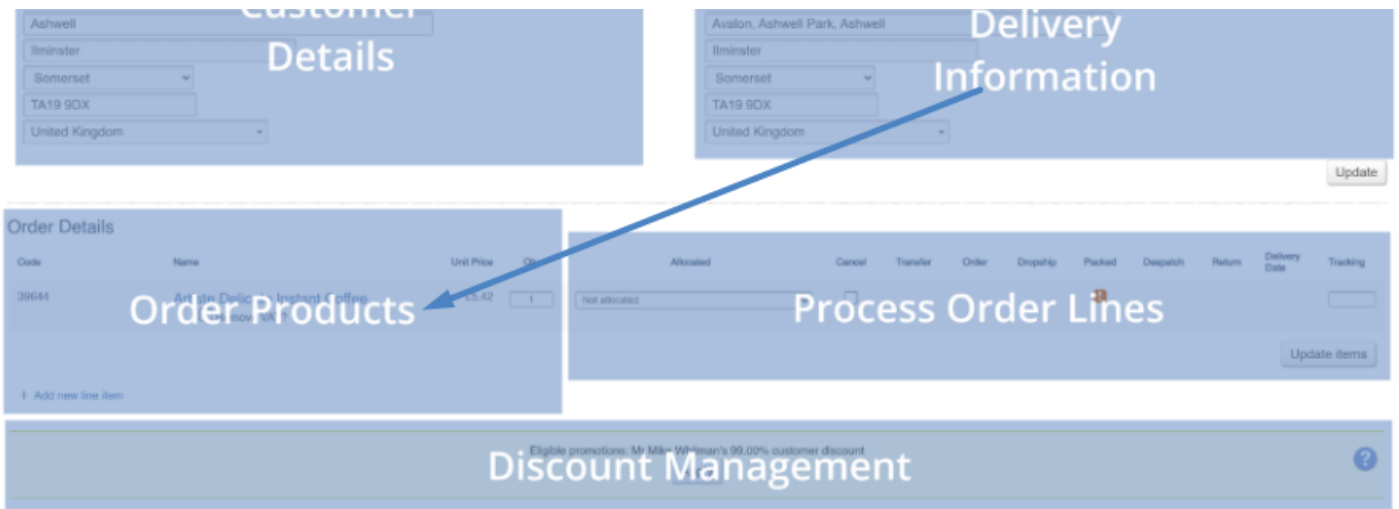
This will copy the billing address to the delivery address.

## Collection Store

If the delivery type 'collect' has been selected for this order, you can select a Ccollection Store from the list.

A Store must be enabled for collection to appear in this list

# Order Products



This section will show a list of Order Products, which are separated into individual Sales Order Lines.

## Product Types

Different products will display differently, with different information.

### Standard Products

These are products without [Customisations](#).

Code	Name	Unit Price	Qty
14354rtgd	Big Red Apple <input type="checkbox"/> Remove VAT?	£19.20	1

Field	Purpose
Code	<i>This is the SKU code of the Variant purchased</i>
Name	<i>This is the name of the Product purchased</i>
Unit Price	<i>This is the price of the Product purchased</i>

*This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*

Field	Purpose
Quantity	The quantity of the Variant purchased by the Customer

## Made to Order Products

These are products with [Customisations](#).

Code	Name	Unit Price	Qty
36880-80713	<b>Demo Sofa (with Swatch Wizard)</b> <b>Fabric</b> Fabric: Sea Green Leather: Orange <input type="checkbox"/> Remove VAT?	£538.40	<input type="text" value="1"/>

Field	Purpose
Code	This is the SKU code of the Variant purchased
Name	This is the name of the Product purchased  Customisations selected by the Customer are detailed below; these are shown in alphabetical order with additional custom options appended below the ones applied on the <a href="#">Customisation</a> tab
Unit Price	This is the price of the Product purchased  <div style="border-left: 2px solid #00AEEF; padding-left: 10px; background-color: #E0F2F7;">             This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold           </div>
Quantity	The quantity of the Variant purchased by the Customer

## Bundle

These are products set up as [Bundles](#).

Code	Name	Unit Price	Qty
39538	Test Bundle	£24.20	<input type="text" value="1"/>
14354rtgd	Big Red Apple	£19.20	1
33930S-74473-74954	Pineapple (standard variants) large bitter	£5.00	1

The contents of a Bundle are displayed below the parent Bundle product; for these, the price and quantity will be greyed out and locked. The prices are for reporting purposes only, designed to show an indicative value assigned to the Bundle components. The quantities are used for fulfilment and stock reservation, as each component may be processed individually.

Field	Purpose
Code	<i>This is the SKU code of the Variant purchased</i>
Name	<i>This is the name of the Product purchased</i>
Unit Price	<i>This is the price of the Product purchased</i>
	<i>This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold</i>
Quantity	<i>The quantity of the Variant purchased by the Customer</i>

## Addons

These are shown below linked Sales Order Lines.

Code	Name	Unit Price	Qty
1854c	Big red apple (with upsells)	£4.00	1
	Item 1: Gift Wrap: Tissue Paper (addon123) <input type="checkbox"/> Remove VAT?		
addon123	Gift Wrap: Tissue Paper	£50.00	1
	<input type="checkbox"/> Remove VAT?		

Addons will be displayed on linked items, as well as on their own line; this is to clearly show which Sales Order Lines are linked to which Addons.

Field	Purpose
Code	<i>This is the SKU code of the Addon purchased</i>
Name	<i>This is the name of the Addon purchased</i>

Field	Purpose
Unit Price	<p><i>This is the price of the Addon purchased</i></p> <div style="border: 1px solid #00aaff; padding: 5px; margin-top: 10px;"> <p><i>This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold</i></p> </div>
Quantity	<i>The quantity of the Addon will always be '1'</i>

## Voucher

Code	Name	Unit Price	Qty
CUSTOMVOUCHER	<p><b>Gift Voucher £10</b></p> <hr/> <p>Gift Voucher email and message...            2025-08-28            info@iconography.co.uk  <input type="checkbox"/> Remove VAT?</p>	£50.00	1

Vouchers are automatically despatched when the order is paid in full.

Field	Purpose
Code	<i>This is the SKU code of the Variant purchased</i>
Name	<i>This is the name of the Product purchased</i>
Unit Price	<p><i>This is the price of the Voucher, either as per the Variant selected, or as per a customer amount for this Sales Order</i></p> <p><i>Additional information will also show on the Sales Order Line:</i></p> <ul style="list-style-type: none"> <li>• <i>date sent</i></li> <li>• <i>recipient email address</i></li> <li>• <i>voucher code</i></li> <li>• <i>balance remaining</i></li> </ul>
Quantity	<i>The quantity of the Variant purchased by the Customer</i>

## Booking

Code	Name	Unit Price	Qty
afternoontea-bury	<b>Afternoon Tea Booking Bury</b> <b>St Edmunds</b> Date: 2025-09-11 Time: 15:30:00 <input type="checkbox"/> Remove VAT?	£5.00	<input type="text" value="4"/>

Field	Purpose
Code	<i>This is the SKU code of the Variant purchased</i>
Name	<i>This is the name of the Product purchased</i>
Unit Price	<i>This is the price of the Variant purchased</i>  <i>Additional information will also show on the Sales Order Line:</i> <ul style="list-style-type: none"> <li><i>date of booking</i></li> <li><i>time of booking</i></li> </ul> <div style="border: 1px solid #00a0e3; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <i>This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold</i> </div>
Quantity	<i>The quantity of the Variant purchased by the Customer</i>

## Other Actions

### Adding a new line item

You can either search for an existing product or add a custom product to a Sales Order

### Existing Product

Search for an existing Product by Name or by Code; you will then be able to make your selection from a list.

— Add new line item

pineapple

Pineapple (standard variants) large bitter

Pineapple (standard variants) large sour

Pineapple (standard variants) large sweet

Pineapple (standard variants) medium bitter

Pineapple (standard variants) medium sour

Pineapple (standard variants) medium sweet

Pineapple (standard variants) small bitter

Pineapple (standard variants) small sour

Pineapple (standard variants) small sweet

~~Pineapple (standard variants) small sweet Condition:Very Damaged~~

~~Pineapple (standard variants) small sweet Grade B~~

~~Pineapple (simple variants) small sour~~

Unavailable Unique Stock Records will be displayed greyed out, with a strikethrough. This is to assist reordering.

## Custom Product

Simply enter a custom SKU Code which doesn't match anything within your product database. Then add a name and price as required.

## Changing quantity ordered

It is only possible to amend the quantity on a Sales Order Line on the day that it was added to the Sales Order. This is to preserve the integrity of reporting.

## Removing VAT

Use the tick box to remove VAT from a product.

A [VAT Exemption Form](#) may be added from the [Quick Access Buttons](#)

## Delete Cancelled Lines

Pressing this button will remove cancelled lines from the Sales Order and all associated paperwork.


These Sales Order Lines are not deleted from the system, and are retained for reporting purposes.

## Change/Choose Addons

Use this button to change/choose Addons.

## Order Details

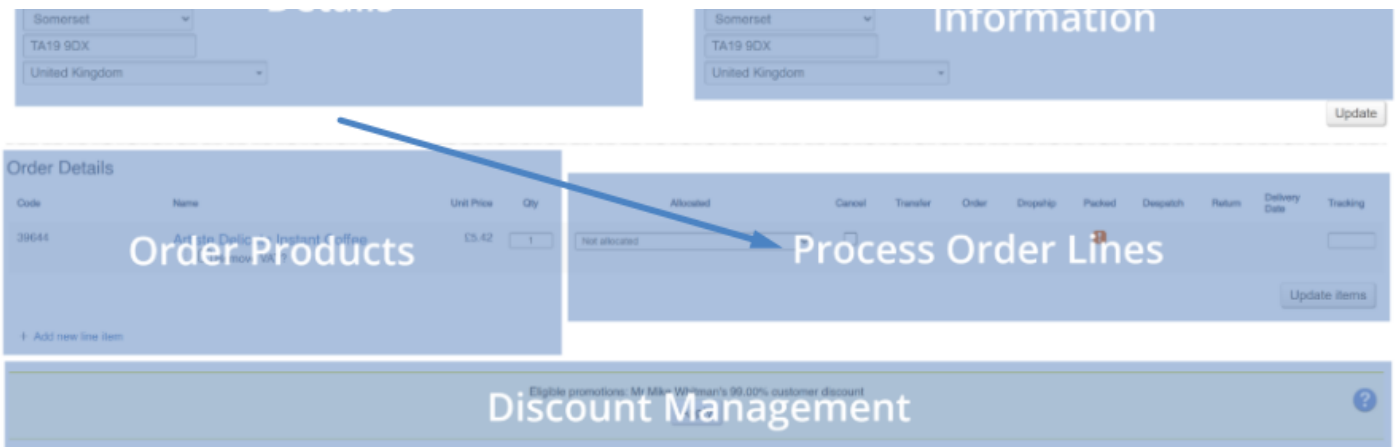
Code	Name
301635	Purbeck Reclaimed Wood Painted Lamp Table <input type="button" value="Choose addons"/>
1854c	Big red apple (with upsells) Item 1: Gift Wrap: Tissue paper (addon123) <input type="button" value="Change addons"/> <input type="checkbox"/> Remove VAT?



## Create RMA

Use this option to create an [RMA](#) (return merchandise authorisation) to formally process a return.

# Process Order Lines



This section is used to manage Sales Order Lines. Actions taken here will affect the [Order Status](#).

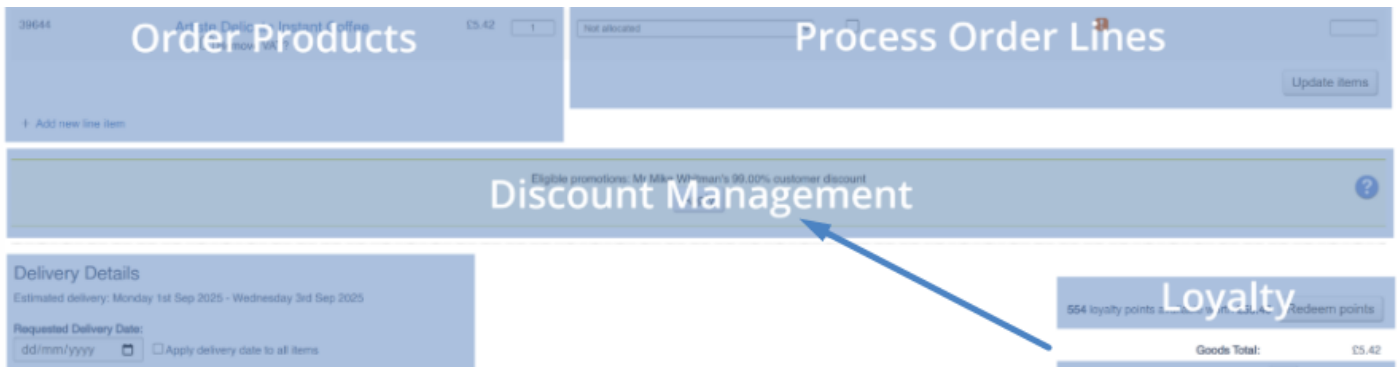
## Actions

Field	Purpose
Cancel	<p>Tick this to cancel the Sales Order Line; you will then be prompted for additional information</p> <ul style="list-style-type: none"> <li>Quantity to return</li> </ul> <p>If you partially cancel a line, this will split the line into two</p> <p>This will only be possible prior to the item being delivered</p> <p>Canceling all or part of a line will also remove all associated discounts applied at line level; sales order level discounts will not be deleted</p>

Field	Purpose
Transfer	<p>Initiate a Transfer</p> <p>This will allow you to initiate a Transfer from the allocated Store and Location to one of your choosing</p> <p><i>This will only display if the allocated Store has 'Enable for web sales fulfilment?' set to 'no'</i></p>
Order	<p>Create a back to back Purchase Order for this Sales Order line</p> <p>Ticking this will create a new Purchase Order Line, either as part of an existing Purchase Order, or as a new Purchase Order, depending on whether you have set the <a href="#">Supplier</a> to 'collate purchase orders'</p> <p><i>This will only display if the Product is linked to a Supplier enabled for Purchase Orders</i></p>
Dropship	<p>Create a drop ship Purchase Order for this Sales Order line</p> <p>Ticking this will create a new Purchase Order for delivery to the Customer's delivery address</p> <p><i>This will only display if the Product is linked to a Supplier enabled for Dropship AND the Sales Order has <a href="#">Delivery</a> applied</i></p>
Packed	<p>Tick this to pack the Sales Order Line</p> <p>You will be prompted to confirm the quantity to pack</p>
Despatch	<p>Tick this to despatch the Sales Order Line</p> <p>You will be prompted to confirm the quantity to despatch; this will default to the number of items which have been packed</p> <p>If you partially despatch a line, this will split the line into two</p>

Field	Purpose
Return	<p data-bbox="810 197 1449 259"><i>Tick this to return the Sales Order Line; you will then be prompted for additional information</i></p> <ul data-bbox="855 309 1401 584" style="list-style-type: none"> <li>• <i>Quantity to return</i></li> <li>• <i>Return reason</i></li> <li>• <i>Location (to which the items should be returned; this will default to the default return location for the Store from which you are currently working)</i></li> <li>• <i>Flag if an exchange is required</i></li> <li>• <i>Create a <a href="#">Supplier Return</a></i></li> </ul> <div data-bbox="815 618 1485 730" style="background-color: #e0f2f7; padding: 5px; border-left: 2px solid #0070c0;"> <p data-bbox="879 645 1437 707"><i>This will only be possible after the item has been delivered</i></p> </div> <div data-bbox="815 768 1485 880" style="background-color: #e0f2f7; padding: 5px; border-left: 2px solid #0070c0;"> <p data-bbox="879 795 1437 857"><i>If you partially return a line, this will split the line into two</i></p> </div>
Delivery Date	<p data-bbox="810 913 1465 945"><i>This will show the requested delivery date, if there is one</i></p> <p data-bbox="810 983 1473 1046"><i>This will be overwritten by the actual delivery date for the Sales Order Line once it is marked as despatched</i></p>
Expected Goods In Date	<p data-bbox="810 1077 1366 1108"><i>This will show below the requested delivery date</i></p> <p data-bbox="810 1146 1469 1209"><i>This will only show if the Sales Order Line is allocated to a Purchase Order</i></p>
Tracking	<p data-bbox="810 1238 1390 1270"><i>Use this to record line specific tracking information</i></p> <p data-bbox="810 1308 1182 1339"><i>This will be sent to the customer</i></p> <div data-bbox="815 1373 1485 1485" style="background-color: #e0f2f7; padding: 5px; border-left: 2px solid #0070c0;"> <p data-bbox="879 1400 1382 1462"><i>For order level tracking information, use the <a href="#">Delivery Management</a> section</i></p> </div>

# Discount Management



Promotions and manual discounts are displayed and can be managed in this section.

Discounts will be displayed here only if they have been applied

Promotions which are live for all customers, e.g. unconditionally, can not be removed.

# Delivery Management

Use this to add delivery details to a Sales Order

Field	Purpose
Book Delivery	<p><i>This will open a pop up to Schedule the Sales Order for delivery</i></p> <p><i>See <a href="#">Scheduling</a> for more information</i></p>
Requested Delivery Date	<p><i>Input a requested delivery date</i></p> <p><i>This is set at a Sales Order level here, but can also be edited per Sales Order Line</i></p>
Apply delivery date to all items	<p><i>Tick to show the requested delivery date against individual Sales Order Lines</i></p>
Courier(s)	<p><i>Enter couriers used for the Sales Order</i></p> <p><i>This will be sent to the customer</i></p> <p><i>This may be auto-filled by certain integrations</i></p>
Additional Tracking Detail	<p><i>Enter tracking numbers used for the Sales Order</i></p> <p><i>This will be sent to the customer</i></p> <p><i>This may be auto-filled by certain integrations</i></p>
Delivery Instructions	<p><i>Use this to amend Delivery Instructions</i></p> <p><i>These will be output on Sales Order Invoices and Delivery Notes</i></p>

# FAQs

## How do the different delivery dates, estimated dates and estimated arrival dates combine on a Sales Order?

The estimated delivery date within the Delivery Management section is an estimate at Sales Order level. It is based on the lead time of the items, and will automatically update as linked Purchase Orders are managed.

It will always show the date that is furthest away.

# Loyalty

Eligible promotions: Mr M's - Whizzer's 99.00% customer discount

## Discount Management

Delivery Details  
Estimated delivery: Monday 1st Sep 2025 - Wednesday 3rd Sep 2025  
Requested Delivery Date: dd/mm/yyyy  Apply delivery date to all items  
Courier(s):  **Delivery**

**Loyalty**  
554 Loyalty Points available for redemption Redeem points

Goods Total:	£5.42
Apply Delivery	£0.00
Apply Discounts	-£0.00

This section displays the loyalty points accrued by the customer, their monetary worth, and invites the user to apply that balance to the current Sales Order.

# Apply Delivery

Eligible promotions: Mr Mike Williams's 90.00% customer discount

## Discount Management

**Delivery Details**  
Estimated delivery: Monday 1st Sep 2025 - Wednesday 3rd Sep 2025  
Requested Delivery Date: dd/mm/yyyy  Apply delivery date to all items  
Courier(s):   
Additional Tracking   
Delivery Instructions:

**Delivery Management**

**Loyalty**  
554 loyalty points  Redeem points

Goods Total:	£5.42
<b>Apply Delivery</b>	00.00
<b>Apply Discounts</b>	-00.00
Order Total (ex VAT):	£5.42
VAT Content:	£1.08
<b>Old Balance</b>	<b>£6.50</b>
Amount Paid:	£2.00
Payment Discrepancy:	£4.50 PAYMENT DUE

Use the controls in this section to add or change the delivery type associated with a Sales Order.

If a delivery type has been added, you will need to configure a delivery address within the [Delivery Information](#) section

If you select 'Collect' you will also need to select a Collection location (this is visible within the [Delivery Information](#) section)

# Apply Discounts

**Delivery Details**  
Estimated delivery: Monday 1st Sep 2025 - Wednesday 3rd Sep 2025

Requested Delivery Date:  
dd/mm/yyyy  Apply delivery date to all items

Courier(s):

Additional Tracking Details:

Delivery Instructions:

554 loyalty points **Loyalty**

Goods Total:	£5.42
<b>Apply Delivery</b>	00.00
<b>Apply Discounts</b>	-00.00
Order Total (ex VAT):	£5.42
VAT Content:	£1.08
<b>Order Balance</b>	<b>£6.50</b>
Amount Paid:	£2.00
Payment Discrepancy:	£4.50 PAYMENT DUE



Use this button to add a new manual discount to a Sales order.

## Promo Code

Enter a valid promo code to apply the relevant discount.

## Custom Discount

Field	Purpose
Reason	<p>Select a reason from the list</p> <p>This is reported on in the <a href="#">Discount Report</a></p> <p>The list is controllable via <a href="#">Site Settings</a></p>
Apply to	<p>Choose from:</p> <ul style="list-style-type: none"><li>• Any single line item</li><li>• The whole Sales Order (this will include Addons, but exclude Delivery)</li><li>• Delivery</li></ul>
Discount Mode	<p>Choose from:</p> <ul style="list-style-type: none"><li>• by amount (discount by a fixed amount)</li><li>• by percentage (discount by a percentage)</li><li>• set value to amount (set the value of the item to £XXX)</li></ul>

Field	Purpose
Value	<i>Enter the value for the corresponding Discount Mode, e.g. 12% or £100</i>
Auth	<i>Enter an Authorisation Pin to approve the Custom Discount</i>  <i>Only Superusers will have an Authorisation Pin</i>  <i>Controllable via <a href="#">Update Users</a></i>

# Balance

Delivery Details

Estimated delivery: Monday 1st Sep 2025 - Wednesday 3rd Sep 2025

Requested Delivery Date:  
dd/mm/yyyy  Apply delivery date to all items

Courier(s):

Additional Tracking Code:

Delivery Instructions:

Delivery  
Management



Loyalty

554 loyalty points

Goods Total:	£5.42
Apply Delivery	00.00
Apply Discounts	-00.00
Order Total (ex VAT):	£5.42
VAT Content:	£1.08
<b>Old Balance</b>	<b>£6.50</b>
Amount Paid:	£2.00
Payment Discrepancy:	£4.50 PAYMENT DUE

This will show a complete breakdown of the Sales Order VAT content, with additional detail on the total amount paid, as well as any Payment Discrepancy.

# Order Notes

The screenshot displays a web interface with several sections. On the left, there is a 'Delivery Management' section with fields for 'Additional Tracking Details', 'Delivery Instructions', and an 'Update' button. On the right, there is an 'Apply Discounts' section with a table of financial data. Below these is a blue bar for 'Order Notes' with a '+ Add a note' link. At the bottom is an 'Order Audit History' section with a list of events. A blue arrow points from the 'Order Notes' section to the 'Order Notes' header.

Apply Discounts	
Order Total (ex VAT):	£5.42
VAT Content:	£1.08
<b>Order Balance</b>	<b>£6.50</b>
Amount Paid:	£2.00
Payment Discrepancy:	£4.50 PAYMENT DUE

**Order Notes**  
+ Add a note

**Order Audit History**

- Acknowledged card payment 2 by iconography at 26/08/2025 15:33:51
- Changed postage from none to standard by iconography at 26/08/2025 15:33:40
- Price change 39644 from 5.42 to 6.50 by iconography at 26/08/2025 15:33:31
- Added 39644 by iconography at 26/08/2025 15:33:31
- Created admin order by iconography at 26/08/2025 15:32:48

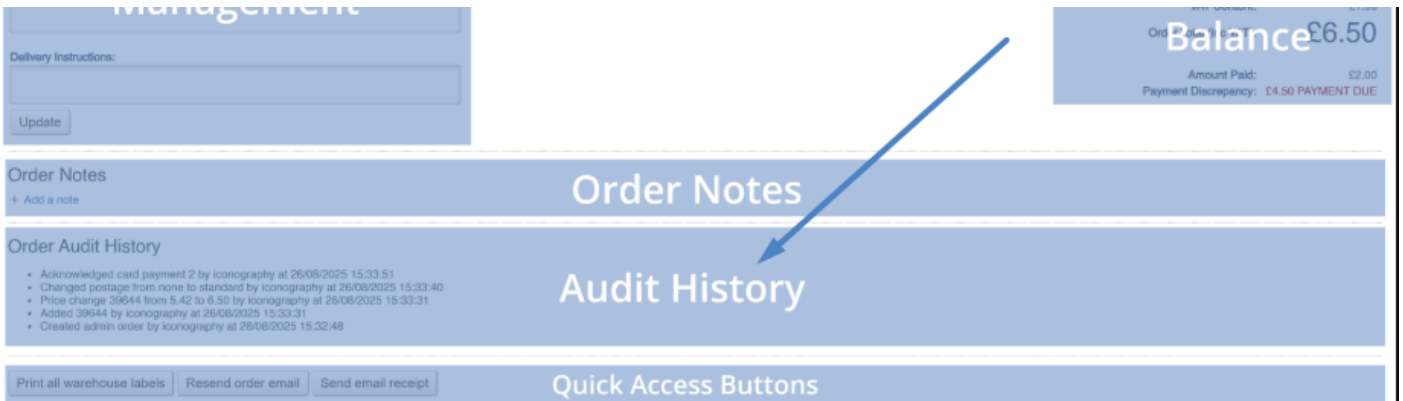
A user may add notes to a Sales Order here.

Use the controls to [add a note or a task](#).

## Email to customer

If toggled, this will email the note to the customer, along with any attachments.

# Audit History



The screenshot displays a software interface with several sections. At the top left, there is a 'management' header and a 'Delivery Instructions' field with an 'Update' button. At the top right, a 'Balance' section shows '£6.50', 'Amount Paid: £2.00', and 'Payment Discrepancy: £4.50 PAYMENT DUE'. Below these are three main horizontal sections: 'Order Notes' with a '+ Add a note' link, 'Order Audit History' containing a list of actions, and 'Quick Access Buttons' with 'Print all warehouse labels', 'Resend order email', and 'Send email receipt' buttons. A blue arrow points from the 'Order Notes' section to the 'Order Audit History' section.

**Order Notes**

+ Add a note

**Order Audit History**

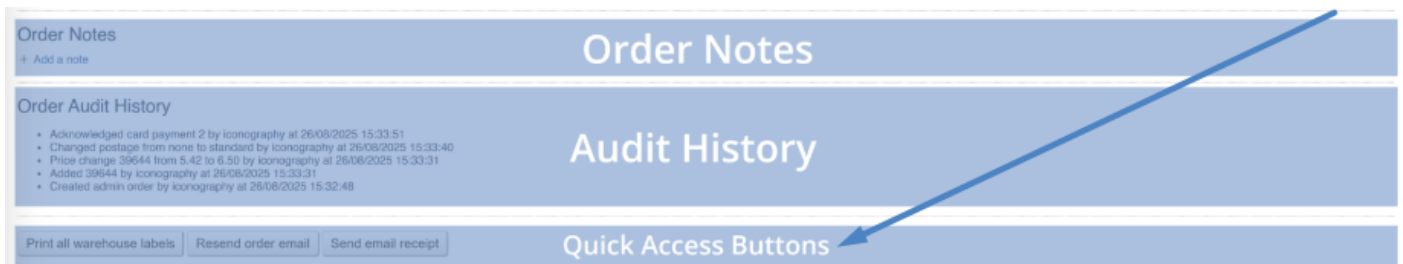
- Acknowledged card payment 2 by iconography at 26/08/2025 15:33:51
- Changed postage from none to standard by iconography at 26/08/2025 15:33:40
- Price change 39644 from 5.42 to 6.50 by iconography at 26/08/2025 15:33:31
- Added 39644 by iconography at 26/08/2025 15:33:31
- Created admin order by iconography at 26/08/2025 15:32:48

**Quick Access Buttons**

Print all warehouse labels   Resend order email   Send email receipt

The audit history shows a log of all actions taken on a Sales Order, along with a timestamp and who took the action.

# Quick Access Buttons



Found at the bottom of the page, these buttons allow you to take various quick actions regarding the order:

Button	Purpose
Print all warehouse labels	<p><i>Print Warehouse labels for Sales Order Lines</i></p> <p><i>The print labels button will print out all active sales order lines, e.g. those lines where the allocation drop down is visible</i></p> <div style="border-left: 2px solid orange; padding-left: 10px; background-color: #fff9e6;"> <p><i>This may print many labels, as it will print one for each unit required to fulfil the Sales Order</i></p> </div>
(Re)Send order email	<i>Sends the Sales Order confirmation email</i>
(Re)Send quote email	<i>Sends the Quote email</i>
(Re)Send email receipt	<p><i>Sends an email receipt for Store orders</i></p> <p><i>If no email has been entered against the customer, an input box will display here</i></p>
(Re)Send despatch email	<i>Sends despatch notification</i>
Create VAT Exemption Form	<p><i>Use this to create a <a href="#">VAT Exemption Form</a> for the Sales Order</i></p> <p><i>Will only show if VAT has been removed from a Sales Order Line</i></p>
(Re)Send Collection Email	<p><i>This will send the customer an email telling them that their order is ready to collection</i></p> <p><i>This will change the status of the Sales Order to Awaiting Collection</i></p>



# FAQs

## How can I find the profit margin on a Sales Order?

Look in the [Order Details](#) section of the Sales Order screen.

## How can I add a payment to my Sales Order?

Use the [Process Payments](#) section of the Sales Order screen.

## Can I edit the quantity on a Sales Order Line?

Yes, but only on the date that line was added to the Sales Order; this is an important restriction to prevent reporting errors.

To change the quantity, either Cancel the line, or add a new one for the same item.

## Why can I remove the VAT on a Sales Order Line?

This is intended for use with Products that are not typically VAT exempt, but where a user may wish to remove the VAT on behalf of the customer.

Typically, this would be for mobility products, such as riser/recliner chairs, for customers with a disability.

Use the [Order Products](#) section to remove VAT from a Sales Order Line.

See also VAT Exemption Forms.

# What does 'Stock allocation to resolve' mean?

This indicates that a Sales Order Line has been overallocated. See [Stock Allocation](#) for more information.