Sales Orders (List)

A summary page of your Sales Orders

- Summary
- Processing Orders
- Filtering Sales Orders

Summary

This screen portrays a summary or your Sales Orders. It can be used to search for a specific Sales Order, observe a filtered view of your Sales Orders, or process them.

You can search for a Sales Order by Customer, Product or by Sales Order Number.

> By default, this screen with show 'active' Sales Orders, which are those that require action.

Filters

You can filter this screen by:

- Search
- Status
- Store User
- Channel
- Supplier
- Fulfilment Store
- Delivery Type
- Date (default is sales order date, optionally by delivery date)
- Sales Orders with notes
- Sales Orders with outstnading balance

Key to icons

draft = draft

abandoned = abandoned

on order = on order

awaiting approval = awaiting action

payment pending = payment pending

refund pending = payment pending

awaiting despatch = awaiting despatch

partially despatched = partially despatched

cancelled = cancelled

completed = completed

partially returned = partially returned

returned = returned

quote = quote

notes = order has notes

notes = Collection

Sales Order Export

It is also possible to export a CSV of your Sales Orders.

The Sales Orders exported will be from your currently filtered view.

Processing Orders

You can process multiple orders simultaneously from this screen.

You can choose to:

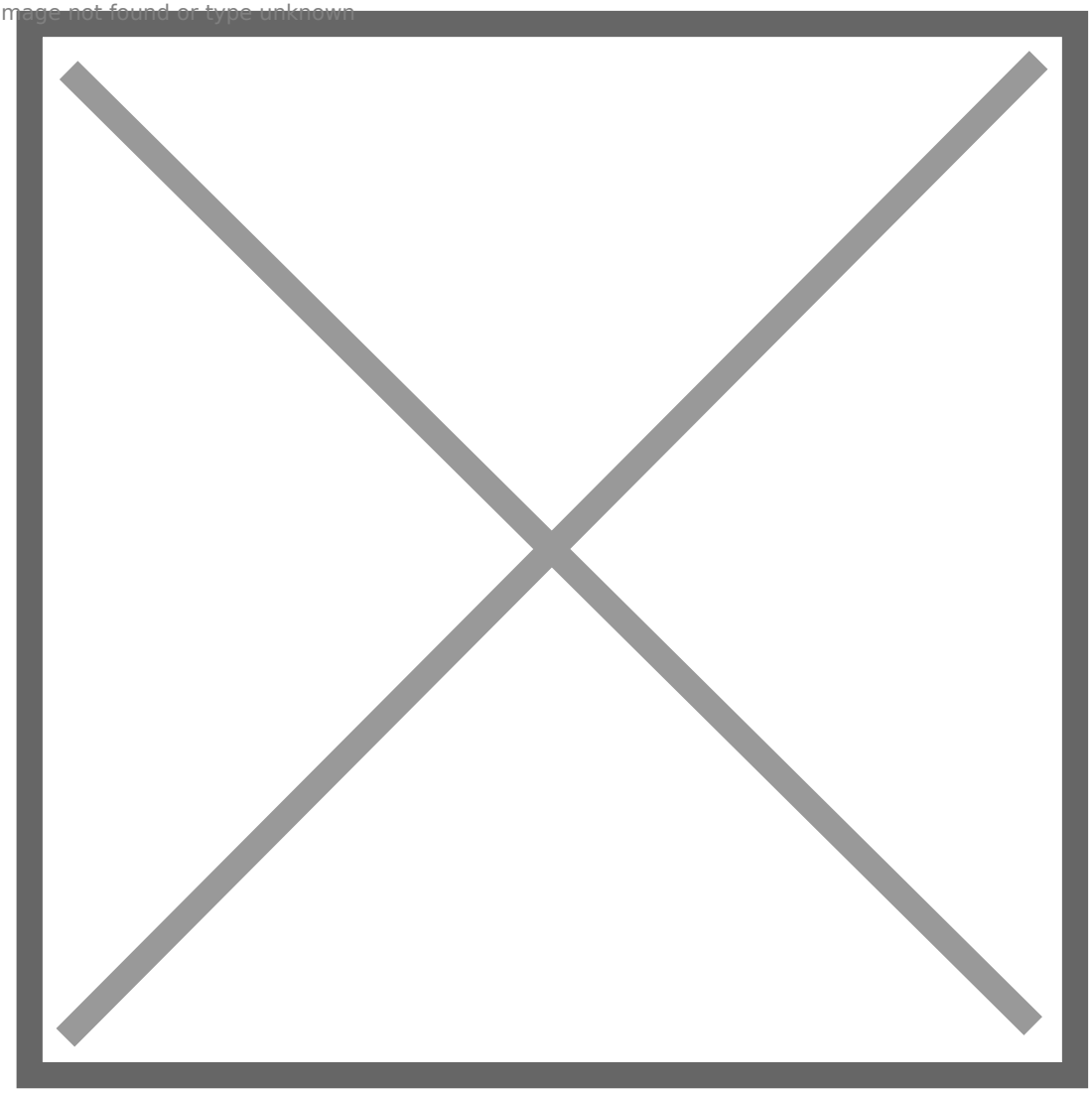
1. Print Picking Lists
2. Print Invoices
3. Print Shipping Labels
4. Despatch Sales Orders
5. Add Notes (the same note to multiple Sales Orders)

> This can send the multiple emails to multiple customers simultaneously

Instructions

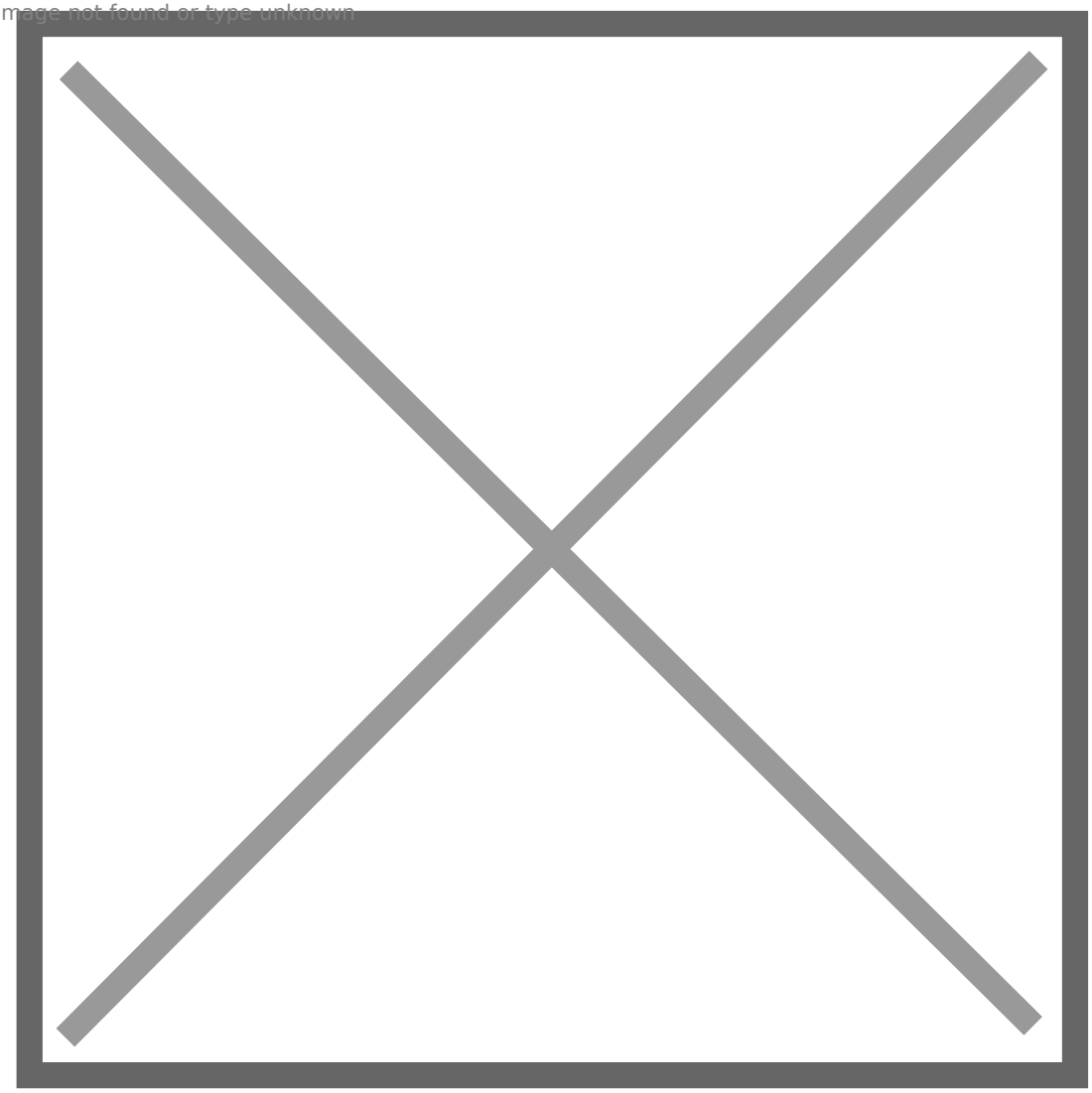
1. Select the Sales Order you wish to process

Image not found or type unknown



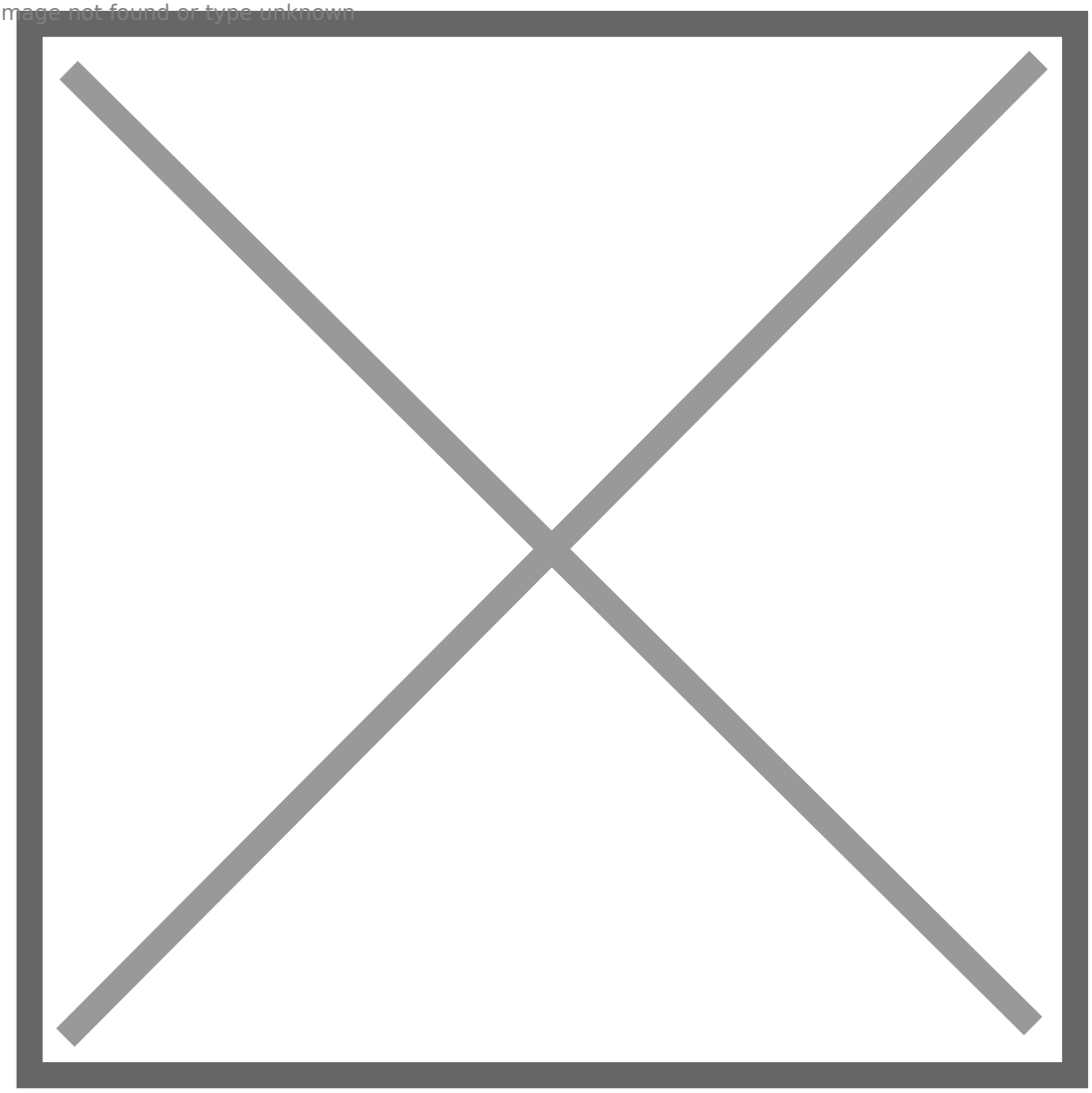
2. Click here

Image not found or type unknown



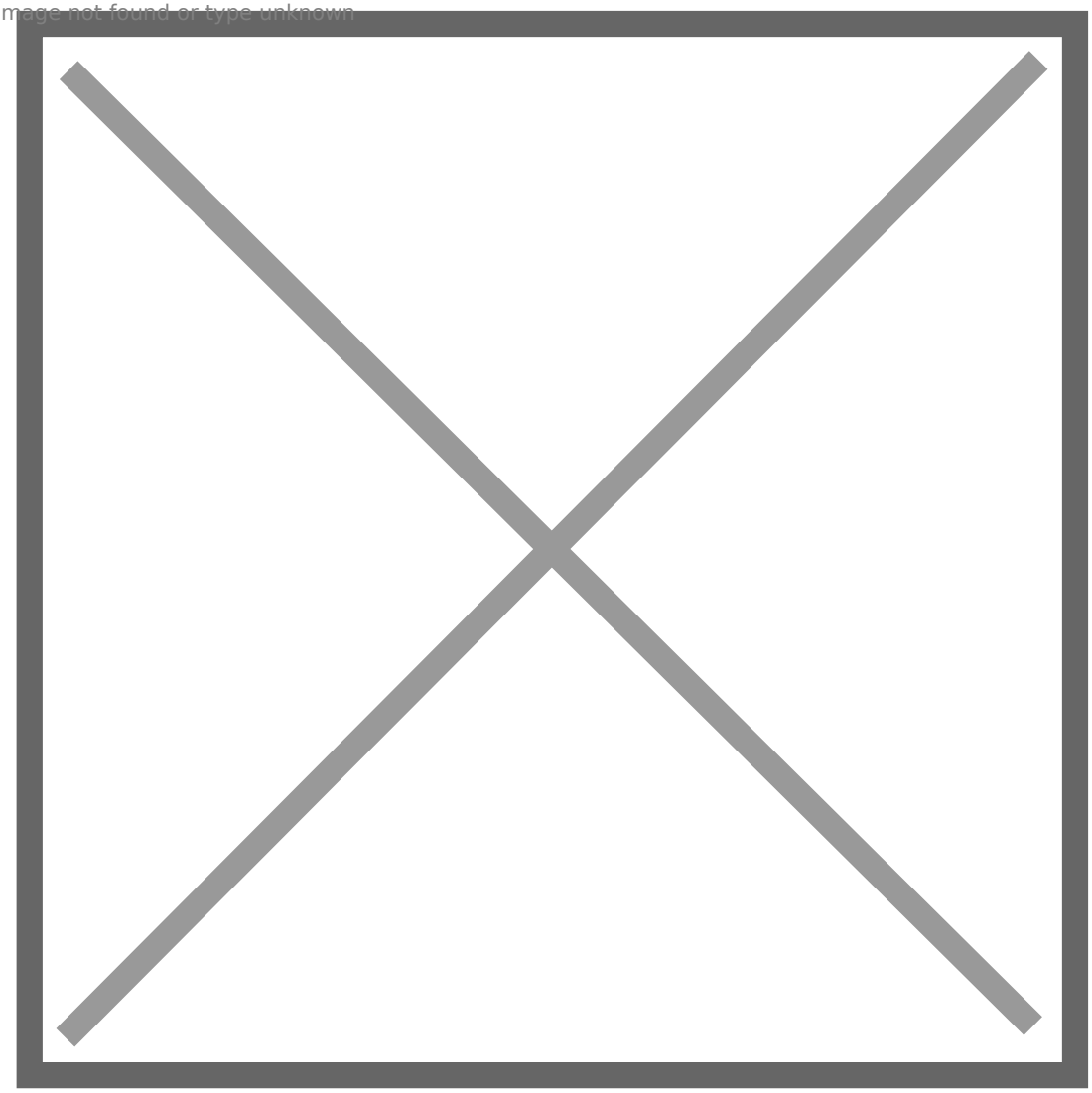
3. Click the button you require

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4. Click to confirm

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Filtering Sales Orders

Use this screen to find similar orders. You can filter by a variety of fields, including:

Field	Purpose
Search	*Search for a Sales Order number, a customer name or a post code*
Status	*Choose from:* • *ACTIVE* • *ALL* • *Draft* • *Payment Pending* • *Unallocated* • *On Order* • *On Transfer* • *Awaiting Action* • *Awaiting Packing* • *Awaiting Despatch* • *Awaiting Collection* • *Despatched* • *Returned* • *Completed* • *Cancelled* • *Abandoned* • *Active Quotes* • *Expired Quotes*
Store User	*Filter by the salesperon linked to the Sales Order*
Channel	*This can be used to either filter by sales channel, e.g. Website, eBay, Phone, etc., or by Store*
Supplier	*This can be used to filter for Sales Orders which contain at least one Product linked to the selected Supplier*
Fulfilment Store	*Filter by the Fulfilment Store*
Delivery	*Filter by Delivery Type*
Date Range	*By default, this will allow you to filter by the order date (default) or by delivery date if you toggle 'Use Delivery Dates'*
Use Delivery Dates	*Allows you to toggle the date filter by delivery date*
With notes	*Filters to show only orders with notes*
With balance	*Filters to only show orders with outstanding balances*