

Sales Orders

Manage your Sales Orders here

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Sales Orders (List)

A summary page of your Sales Orders


Summary

This screen portrays a summary of 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.

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

Key to icons

 = draft

 = abandoned

 = on order

 = awaiting action


 = payment pending

 = payment pending

 = awaiting despatch

 = partially despatched

 = cancelled

 = completed

 = partially returned

 = returned

 = quote

 = order has 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:

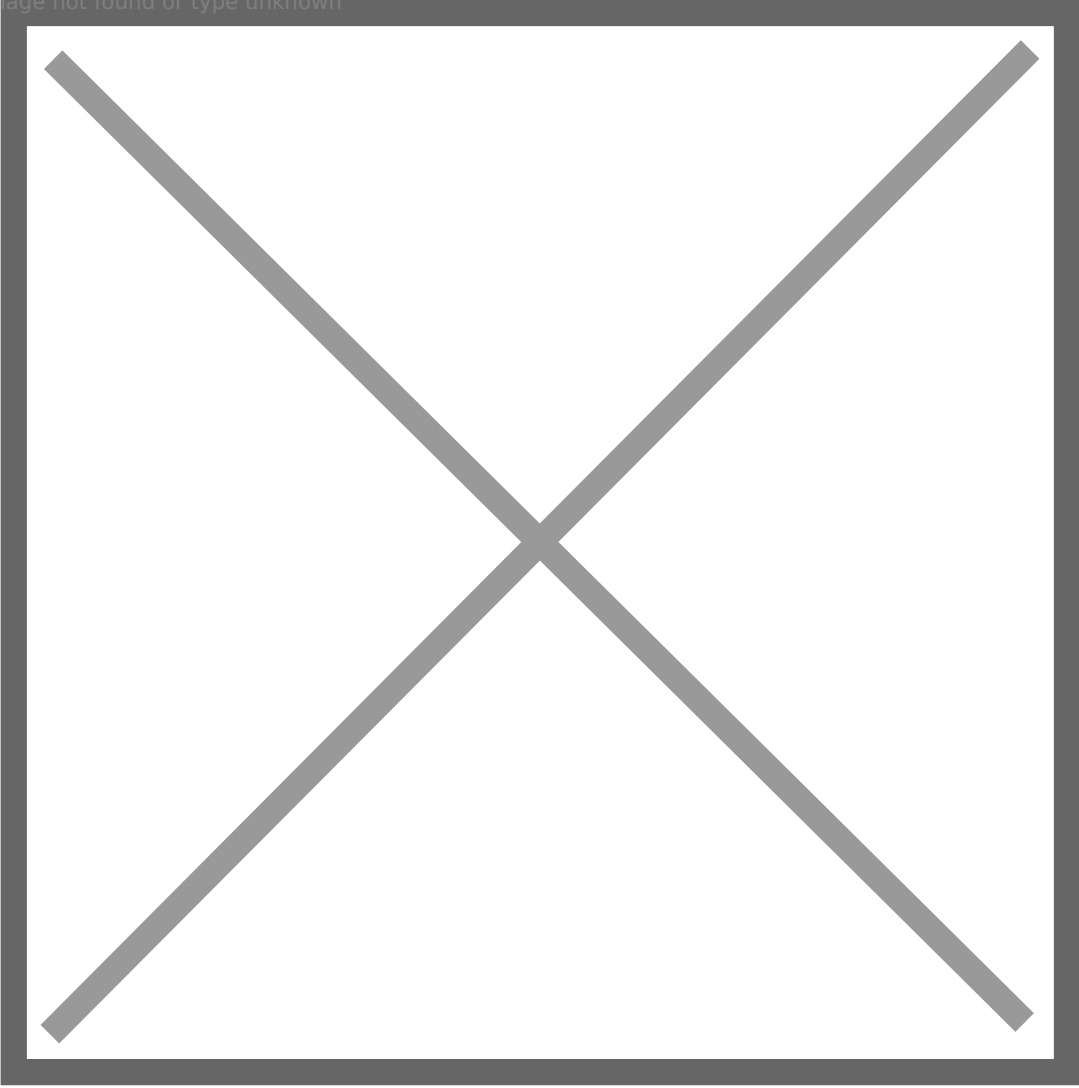
1. Print Picking Lists
2. Print Invoices
3. Print Shipping Labels
4. Despatch Sales Orders
5. Add Notes (the same note to multiple Sales Orders)

This can send the multiple emails to multiple customers simultaneously

Instructions

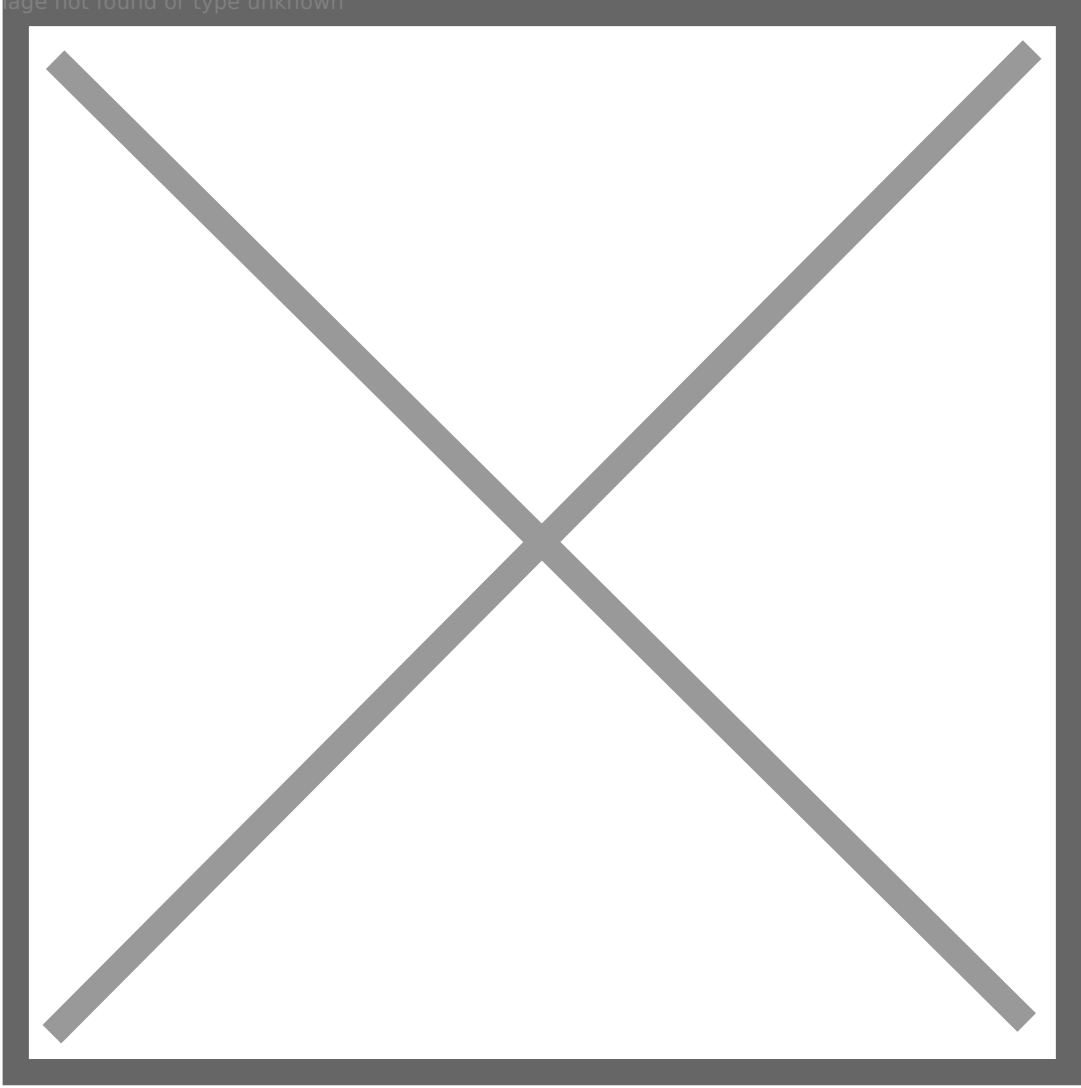
1. Select the Sales Order you wish to process

Image not found or type unknown



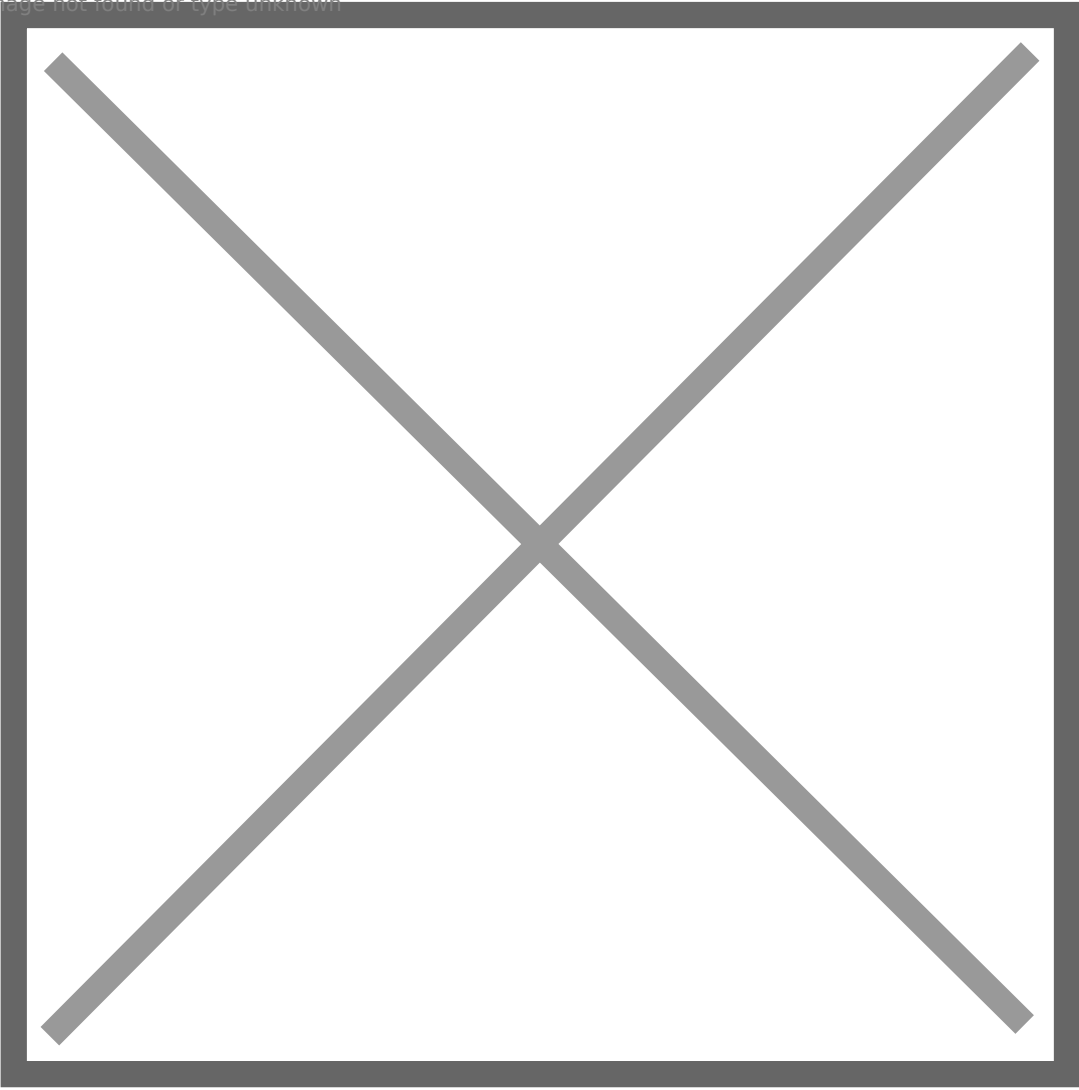
2. Click here

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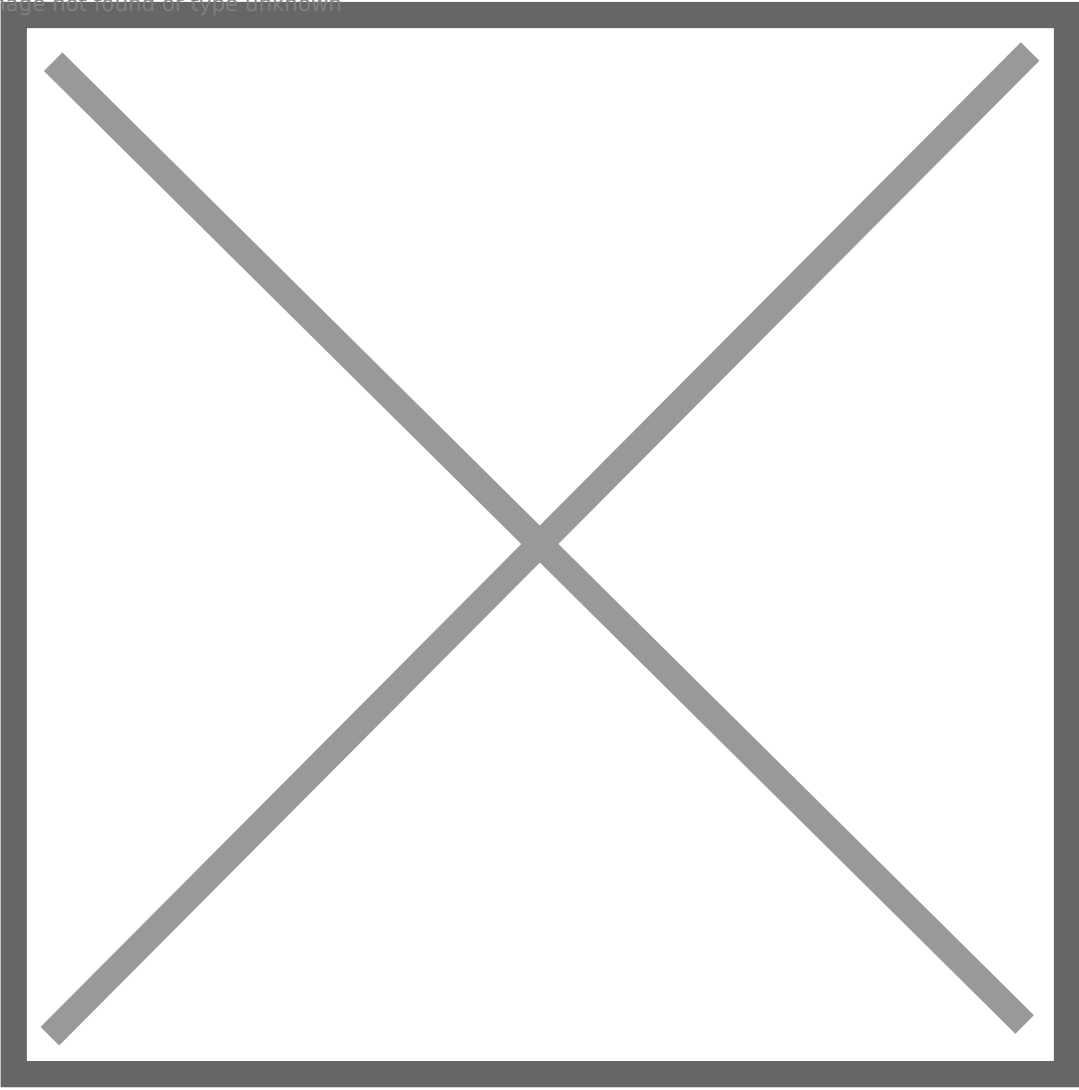
3. Click the button you require

Image not found or type unknown



4. Click to confirm

Image not found or type unknown



Filtering 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	<p>Choose from:</p> <ul style="list-style-type: none"> • 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 salesperson 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
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

Sales Orders (Detail)

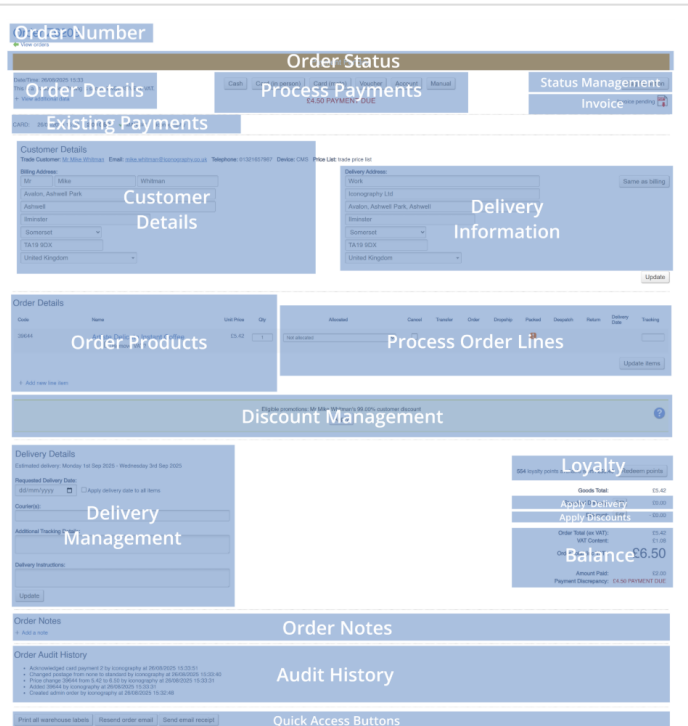
Summary

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](#)
- [Order Status](#)
- [Order Details](#)
- [Process Payments](#)
- [Status Management](#)
- [Invoice](#)
- [Existing Payments](#)
- [Customer Details](#)
- [Delivery Information](#)
- [Order Products](#)
- [Process Order Lines](#)
- [Discount Management](#)
- [Delivery Management](#)
- [Loyalty](#)
- [Apply Delivery](#)
- [Apply Discounts](#)
- [Balance](#)
- [Order Notes](#)
- [Audit History](#)
- [Quick Access Buttons](#)



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 allocated to the Sales Order</i> <div style="background-color: #e0f0ff; 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 Purchase Order</i>

Status	Purpose
On Transfer	<i>This will be set if at least on line on the Sales Order is allocated to an active Stock Transfer</i>
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"> <i>• Manual interaction</i> <i>• Outstanding balance after delivery</i> <i>• Integration problems</i> <p><i>It may be set and must be cleared manually</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>

Status	Purpose
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

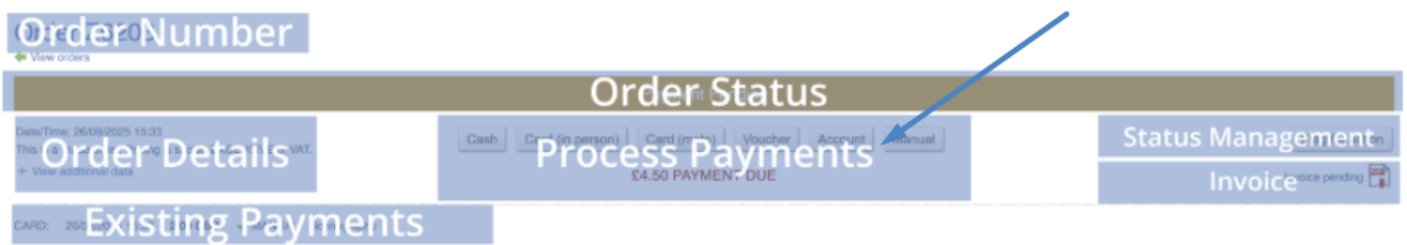
The screenshot shows a software interface for 'Order Details'. At the top left, there is a section for 'Order Number' with a 'View orders' link. Below this is a 'Date/Time' field showing '26/09/2025 15:33' and a 'View additional data' link. The main header is 'Order Status' with a 'Process Payments' button. Below the header, there are buttons for 'Cash', 'Credit (in person)', 'Card (m...)', 'Voucher', 'Account', and 'Manual'. To the right, there is a 'Status Management' section with an 'Invoice' button. At the bottom left, there is an 'Existing Payments' section. A blue arrow points from the 'Order Number' section to the 'Order Details' section.

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

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

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 409" style="border-left: 2px solid #0070C0; background-color: #D9E1F2; padding-left: 10px;"><p data-bbox="879 353 1347 387"><i>Only required for third party integrations</i></p></div>
Order Margin	<p data-bbox="810 450 1347 483"><i>This displays the Sales Order margin (if known)</i></p>

Process Payments



Use this section to add Payments to the Sales Order.

Available Payment Types will be visible here.

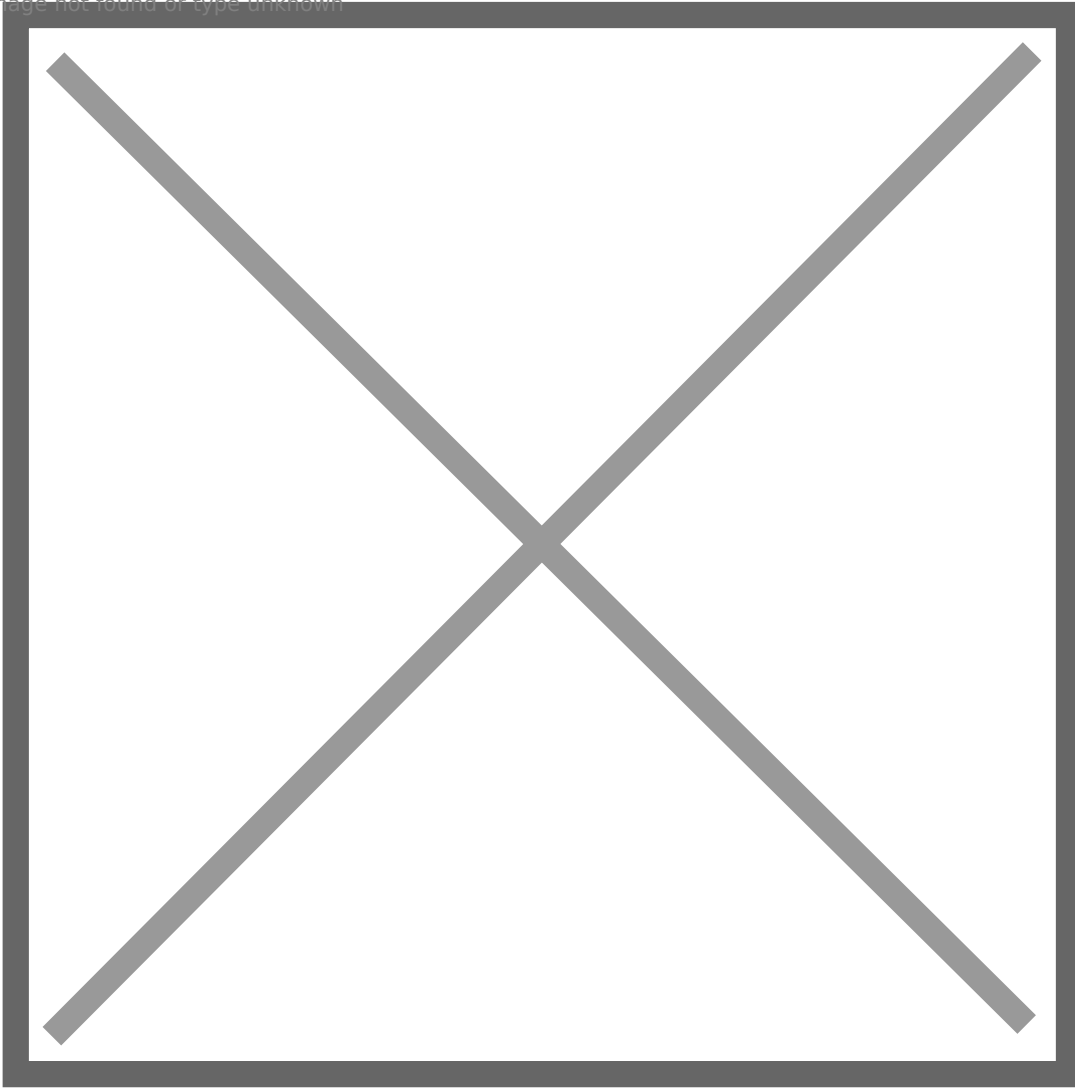
If you need to finalise a PENDING payment, you will need to manage [Existing Payments](#)

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

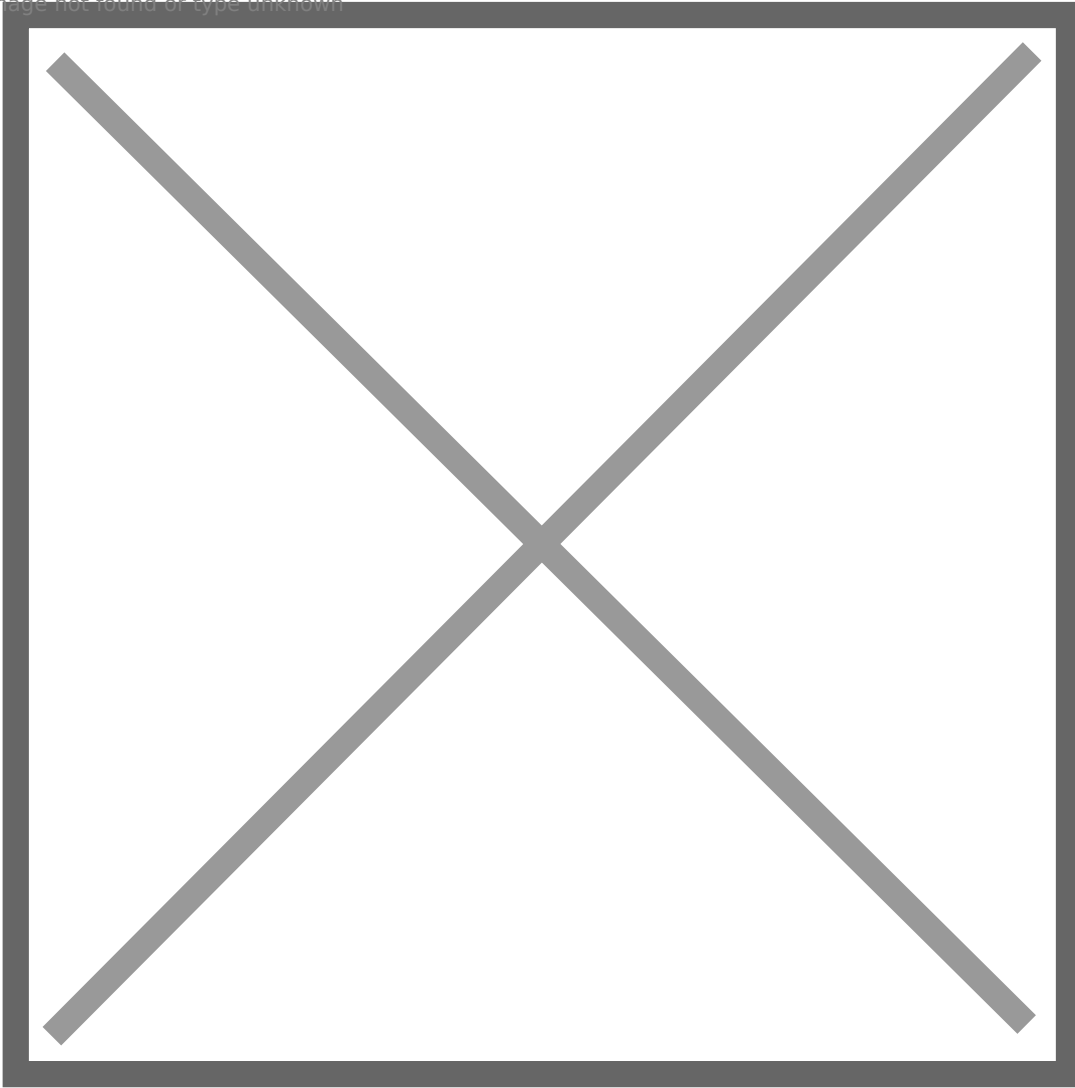
Image not found or type unknown



2. Confirm payment amount (defaults to full amount)

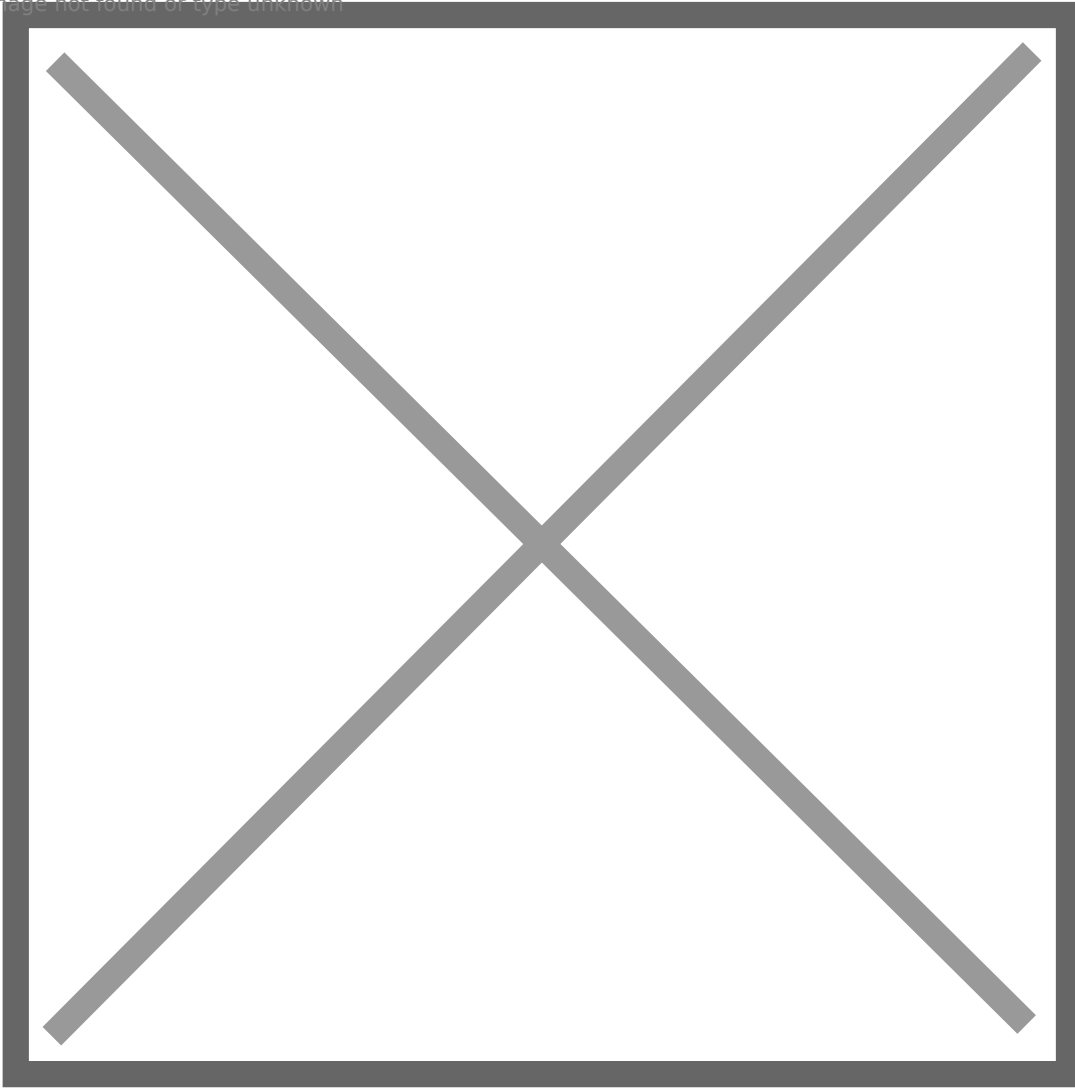
3. For the 'Manual' payment , choose a payment type from the drop down

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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: 1px solid orange; background-color: #fff9e6; padding: 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 Quick Access Buttons</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

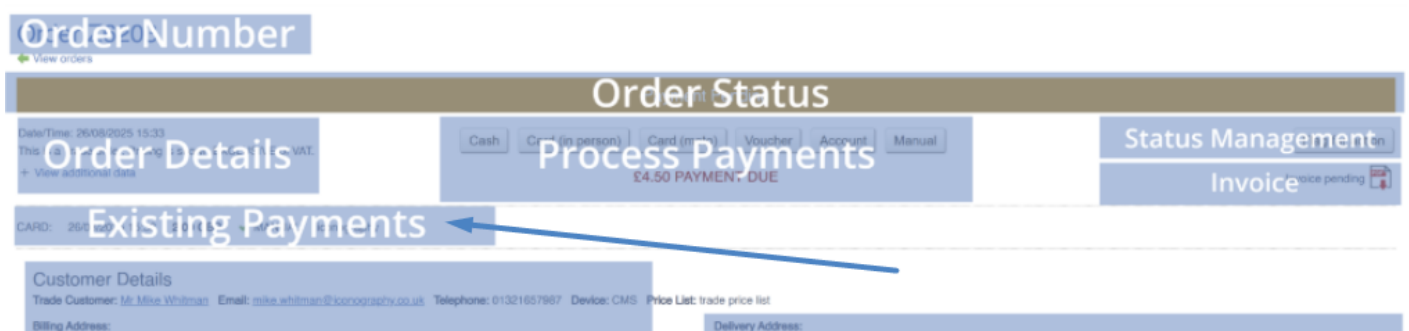
The screenshot shows a web interface for sales order details. At the top left, there is a section for 'Order Number' with a 'View orders' link. Below this is a 'Process Payments' section with buttons for 'Cash', 'Credit (in person)', 'Card (m...)', 'Voucher', 'Account', and 'Manual'. To the right of this is a 'Status Management' section containing an 'Invoice' link with a PDF icon and the text 'Invoice pending'. A blue arrow points from the 'Invoice' link down to the 'Customer Details' section. The 'Customer Details' section includes fields for 'Trade Customer', 'Email', 'Telephone', 'Device', and 'Price List'. Below this are 'Billing Address' and 'Delivery Address' sections with input fields for name and address. A 'Same as billing' button is also present.

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	<input type="button" value="Cancel payment"/>
CASH:	01/12/2025 16:19	0.02 GBP	✓	MANUAL	iconography	<input type="button" value="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: 256 Existing Payments

Customer Details

Trade Customer: Mr. Mike Whitman Email: mike.whitman@iconography.co.uk Telephone: 01321657987 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

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

Delivery Address:

Work

Iconography Ltd

Avalon, Ashwell Park, Ashwell

Ilminster

Somerset

TA19 9DX

United Kingdom

Same as billing

Update

Customer Details

Delivery Information

Edit delivery information here.

Same as billing

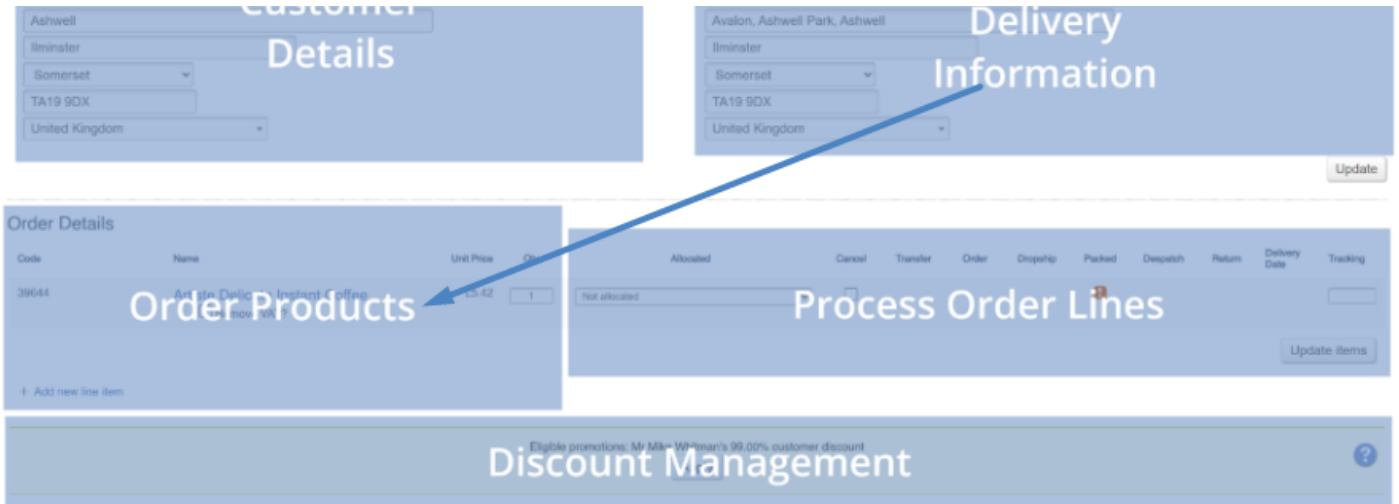
This will copy the billing address to the delivery address.

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	<input type="text" value="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>

Field	Purpose
Unit Price	<p><i>This is the price of the Product purchased</i></p> <div style="border: 1px solid #00a0e3; 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 Variant purchased by the Customer</i>

Made to Order Products

These are products with [Customisations](#).

Code	Name	Unit Price	Qty
36880-80713	<p>Demo Sofa (with Swatch Wizard)</p> <p>Fabric</p> <ul style="list-style-type: none"> Fabric: Sea Green Leather: Orange <input type="checkbox"/> Remove VAT? 	£538.40	1

Field	Purpose
Code	<i>This is the SKU code of the Variant purchased</i>
Name	<p><i>This is the name of the Product purchased</i></p> <p><i>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 Customisation tab</i></p>
Unit Price	<p><i>This is the price of the Product purchased</i></p> <div style="border: 1px solid #00a0e3; 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 Variant purchased by the Customer</i>

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	<input type="text" value="1"/>
	Item 1: Gift Wrap: Tissue Paper (addon123) <input type="checkbox"/> Remove VAT?		
addon123	Gift Wrap: Tissue Paper <input type="checkbox"/> Remove VAT?	£50.00	1

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>
Unit Price	<i>This is the price of the Addon purchased</i> <div style="border: 1px solid #00aaff; 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 Addon will always be '1'</i>

Voucher

Code	Name	Unit Price	Qty
CUSTOMVOUCHER	Gift Voucher £10 <hr/> Gift Voucher email and message... 2025-08-28 info@iconography.co.uk <input type="checkbox"/> Remove VAT?	£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	<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> <i>Additional information will also show on the Sales Order Line:</i> <ul style="list-style-type: none"> • <i>date sent</i> • <i>recipient email address</i> • <i>voucher code</i> • <i>balance remaining</i>
Quantity	<i>The quantity of the Variant purchased by the Customer</i>

Booking

Code	Name	Unit Price	Qty
afternoontea-bury	Afternoon Tea Booking Bury St Edmunds 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"> <i>date of booking</i> <i>time of booking</i> <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

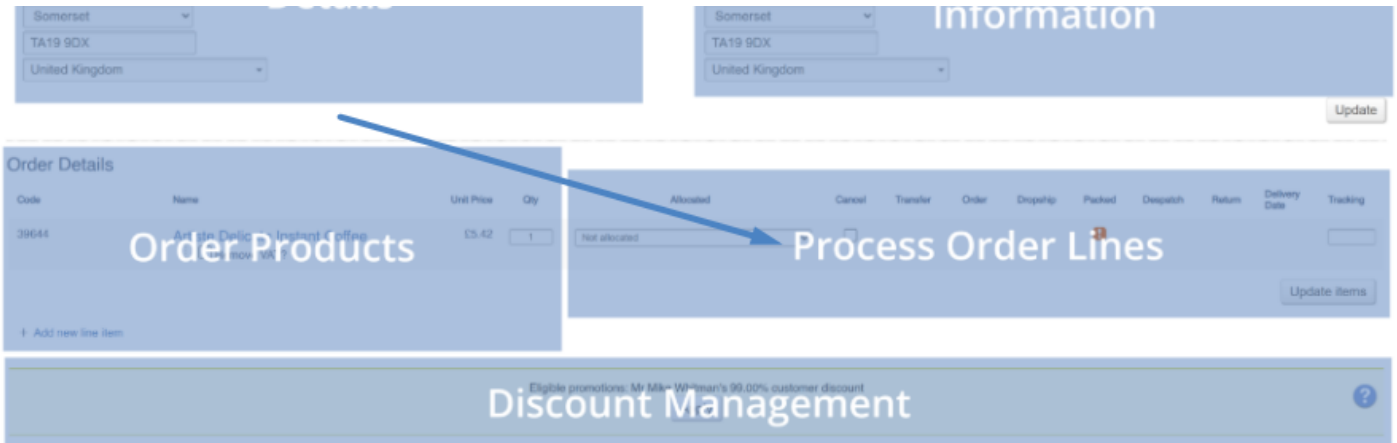
Code	Name
301635	Purbeck Reclaimed Wood Painted Lamp Table <input type="button" value="Choose addons"/>
1854c	Big red apple (with upsells) Item 1: Gift Wrap: Tissue paper (addon123) <input type="button" value="Change addons"/> <input type="checkbox"/> Remove VAT?



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](#).

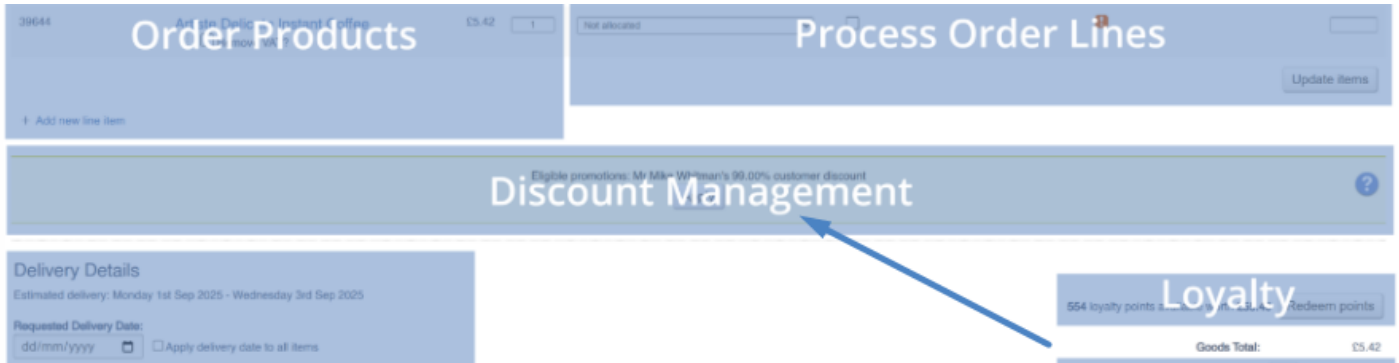
Actions

Field	Purpose
Cancel	<p>Tick this to cancel the Sales Order Line; you will then be prompted or additional information</p> <ul style="list-style-type: none"> Quantity to return <p><i>If you partially cancel a line, this will split the line into two</i></p> <p><i>This will only be possible prior to the item being delivered</i></p> <p><i>Cancelling all or part of a line will also remove all associated discounts applied at line level; sales order level discounts will not be deleted</i></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 Supplier 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 Delivery 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"> • <i>Quantity to return</i> • <i>Return reason</i> • <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> • <i>Flag if an exchange is required</i> • <i>Create a Supplier Return</i> <div data-bbox="815 618 1485 734" 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 884" 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 1393 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 1503" style="background-color: #e0f2f7; padding: 5px; border-left: 2px solid #0070c0;"> <p data-bbox="879 1400 1385 1476"><i>For order level tracking information, use the Delivery Management 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>This will open a pop up to Schedule the Sales Order for delivery</p> <p>See Scheduling for more information</p>
Requested Delivery Date	<p>Input a requested delivery date</p> <p>This is set at a Sales Order level here, but can also be edited per Sales Order Line</p>
Apply delivery date to all items	<p>Tick to show the requested delivery date against individual Sales Order Lines</p>
Courier(s)	<p>Enter couriers used for the Sales Order</p> <p>This will be sent to the customer</p> <p>This may be auto-filled by certain integrations</p>
Additional Tracking Detail	<p>Enter tracking numbers used for the Sales Order</p> <p>This will be sent to the customer</p> <p>This may be auto-filled by certain integrations</p>
Delivery Instructions	<p>Use this to amend Delivery Instructions</p> <p>These will be output on Sales Order Invoices and Delivery Notes</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

The screenshot shows a software interface with a blue header bar containing the text "Discount Management" and a small question mark icon. Below the header, there are two main sections. On the left is the "Delivery Details" section, which includes "Estimated delivery: Monday 1st Sep 2025 - Wednesday 3rd Sep 2025", a "Requested Delivery Date" field with a calendar icon and a checkbox for "Apply delivery date to all items", and a "Courier(s)" field with a large "Delivery" button. On the right is the "Loyalty" section, which displays "554 loyalty points" and a "Redeem points" button. Below this, there is a table with the following content:

Goods Total:	£5.42
Apply Delivery	00.00
Apply Discounts	-00.00

A blue arrow points from the "Loyalty" section towards the "Delivery" section.

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

The screenshot shows a software interface with a blue header bar containing the text "Discount Management" and a question mark icon. Below the header, there are two main sections. On the left is the "Delivery Details" section, which includes a date picker for "Requested Delivery Date" (set to dd/mm/yyyy), a checkbox for "Apply delivery date to all items", a text input for "Courier(s)", a text input for "Additional Tracking Details", and a text input for "Delivery Instructions". A large, semi-transparent "Delivery Management" watermark is overlaid on this section. On the right is the "Loyalty" section, which shows "554 loyalty points" and a "Redeem points" button. Below this is a table of items:

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

A blue arrow points from the "Apply Delivery" button in the Loyalty section to the "Delivery Management" watermark in the Delivery Details section.

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:
Update

Loyalty	
554 loyalty points	Redeem points
Goods Total:	£5.42
Apply Delivery	£0.00
Apply Discounts	-£0.00
Order Total (ex VAT):	£5.42
VAT Content:	£1.08
Order Balance	£6.50
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 Discount Report</p> <p>The list is controllable via Site Settings</p>
Apply to	<p>Choose from:</p> <ul style="list-style-type: none">• Any single line item• The whole Sales Order (this will include Addons, but exclude Delivery)• Delivery

Field	Purpose
Discount Mode	<p>Choose from:</p> <ul style="list-style-type: none">• by amount (discount by a fixed amount)• by percentage (discount by a percentage)• set value to amount (set the value of the item to £XXX)
Value	<p>Enter the value for the corresponding Discount Mode, e.g. 12% or £100</p>
Auth	<p>Enter an Authorisation Pin to approve the Custom Discount</p> <p>Only Superusers will have an Authorisation Pin</p> <p>Controllable via Update Users</p>

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 Data:

Delivery Instructions:



Loyalty
554 loyalty points

Goods Total:	£5.42
Apply Delivery	00.00
Apply Discounts	-00.00
Order Total (inc VAT):	£5.42
VAT Content:	£1.08
Old Balance	£6.50
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 sales order detail page with several sections:

- Delivery Management:** Includes fields for 'Additional Tracking Code', 'Delivery Instructions', and an 'Update' button.
- Apply Discounts:** A summary table showing:

Apply Discounts		00.00
Order Total (ex VAT):		£5.42
VAT Content:		£1.08
Order Total:		£6.50
Amount Paid:		£2.00
Payment Discrepancy:		£4.50 PAYMENT DUE
- Order Notes:** A section with a '+ Add a note' link and a large 'Order Notes' header. A blue arrow points to this section.
- Order Audit History:** A section with an 'Audit History' header and a list of events:
 - 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 29644 from 5.42 to 6.50 by iconography at 26/08/2025 15:33:31
 - Added 29644 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

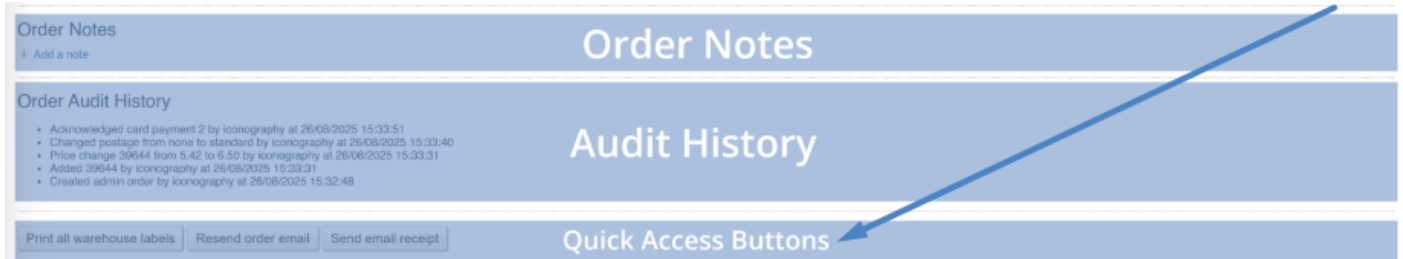
If toggled, this will email the note to the customer, along with any attachments.

Audit History

The screenshot displays a sales order management interface. At the top right, a summary box shows the **Balance** as £6.50, with 'Amount Paid' at £2.00 and a 'Payment Discrepancy' of £4.50 PAYMENT DUE. Below this are sections for 'Delivery Instructions' (with an 'Update' button), 'Order Notes' (with a '+ Add a note' link), and 'Order Audit History'. The 'Order Audit History' section contains a list of actions: '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', and 'Created admin order by iconography at 26/08/2025 15:32:48'. At the bottom, there are 'Quick Access Buttons' for 'Print all warehouse labels', 'Resend order email', and 'Send email receipt'. A blue arrow points from the 'Order Notes' section to the 'Audit History' section.

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>This may print many labels, as it will print one for each unit required to fulfil the Sales Order</i></p>
(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 VAT Exemption Form 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.