Sales Order Screen - How To's

Last Modified on 08/31/2026 9:56 am EDT

'**Sales Order screen**' is a comprehensive screen that stores and displays every significant information about a Sales Order transaction all on one screen. It is divided into four (4) main sections to organize data and functions:

- **Main Fields (section)**
  - **Bill To -** The entity who will pay for the order.
  - **Ship To -** The entity who will receive the order.
  - **SO # -** Record numbering type can be set at **Settings>System>Record Numbering** as manual, sequential or date format.
  - **Status -** Sales Order status is displayed here. The settings can be set at **Settings>Warehouse>Shipping/Receiving>Shipping-Sales Order Statuses.**
  - **Invoice # -** The Invoice related to the Sales Order.
  - **Quote # -** The Quote related to the Sales Order.
  - **Warehouse -** The warehouse where the ordered item(s) will be taken to be delivered to the customer.
  - **Order Date -** The date the Sales Order was created.
  - **Created By, Entered By, and Sales Rep** (fields) **-** This auto fills with the name of the user logged in when it is created or converted from a Quote.
    - NOTE: For reporting and commission tracking purposes, there are 3 fields that are similar to each other:
      - **Created By**: (Think of 'Original Creation....'
        - Quotations
          - If created **brand new** or from the **Find Parts** screen, it will use the Logged in User.
          - If created by an '**integration**' (such as CCC, etc) then we will use the 'Default Created By User' established in each particular Integration.
          - ( ) If created by the **Customer Portal**, then we will insert 'Customer Portal' as the Created By User.
        - Sales Orders
          - If created by a User from the **Sales Order** or **Find Parts** screen, this is filled in with the logged in users name.
          - If created by a User from a **Quote**, then the Sales Order Created By will copy the Quotation CreatedBy.
          - If created by an '**integration**' (such as eBay, CCC, etc) then we will use the 'Default Created By User' established in each particular Integration.
          - ( ) If created by the **Customer Portal**, then we will insert 'Customer Portal' as the Created By User.
        - Invoices
          - If created from a Sales Order then the Created by will inherit the Sales Order Created by.
          - If created new (for NON Inventory based Invoices) the Invoice Created by will be the Logged in user.
        - Credit Memo's
          - If created from an **Invoice** or created brand new, it will use the Logged in User.
          - ( ) If created from **Scanner User** (linked to an Invoice), the new Credit Memo Created By will inherit the **Invoice created by**.
      - **Entered By**:
        - When **manually created by a User**....This is auto filled in with the logged in users name.

            (Even if the Sales Order or Invoice is 'converted' from a Quote or Sales Order, this will auto fill in the logged in users' name).
            - When created by an **integration**... then we will use the 'Default Created By User' established in each particular Integration.
            - When created by the **Scanner**... then we will use the scanner user name.
            - When created by the **Customer Portal** we will insert 'Customer Portal'.
        - **Sales Rep**:
            - By default this field remains empty. If the selected Customer has a Sales Rep saved on its record, then that Sales Rep will be auto filled.
            - There is also an option in the settings to auto fill the **Sales Rep** field with the *logged in user* that is creating and/or entering the sales transaction.
    - **Customer PO # -** The Purchase Order # on the Customer's purchase document. (Optional) For document tracking purposes.
    - **Payment Terms -** Payment terms and conditions you set as the seller. Pre-define your Payment Terms settings according to your company set conditions. **Go to Settings>Sales>General Sales Settings>Payment terms (section).**
    - **Sales Rep -** The Sales Representative assigned to the customer. (There is an option to auto fill this field from the who communicated or closed the sale.
    - **Order Source -** Where an order originated from.
    - **Shipped Via -** The shipping method.
    - **Email**
    - **Job ID -** The Job record related to the Sales Order.
- **Add/Edit Line Item (section)**
    - **Audit Log**
      
      icon - Lets you view all updates (and details) made on this section.
    - **Gear**
      
      icon - Click to view all Column Filters on this section. You may check/uncheck to show/hide these fields.
    - **Double Arrow Down**

      icon - Click to show Line 2 fields.
    - **Double Arrow Up**

      icon - Click to hide Line 2 fields.
    - **Commit Line Item**
      

      button - Click to validate and save any data input or changes on the Add/Edit Line Item table. This button turns red when you need to do so.

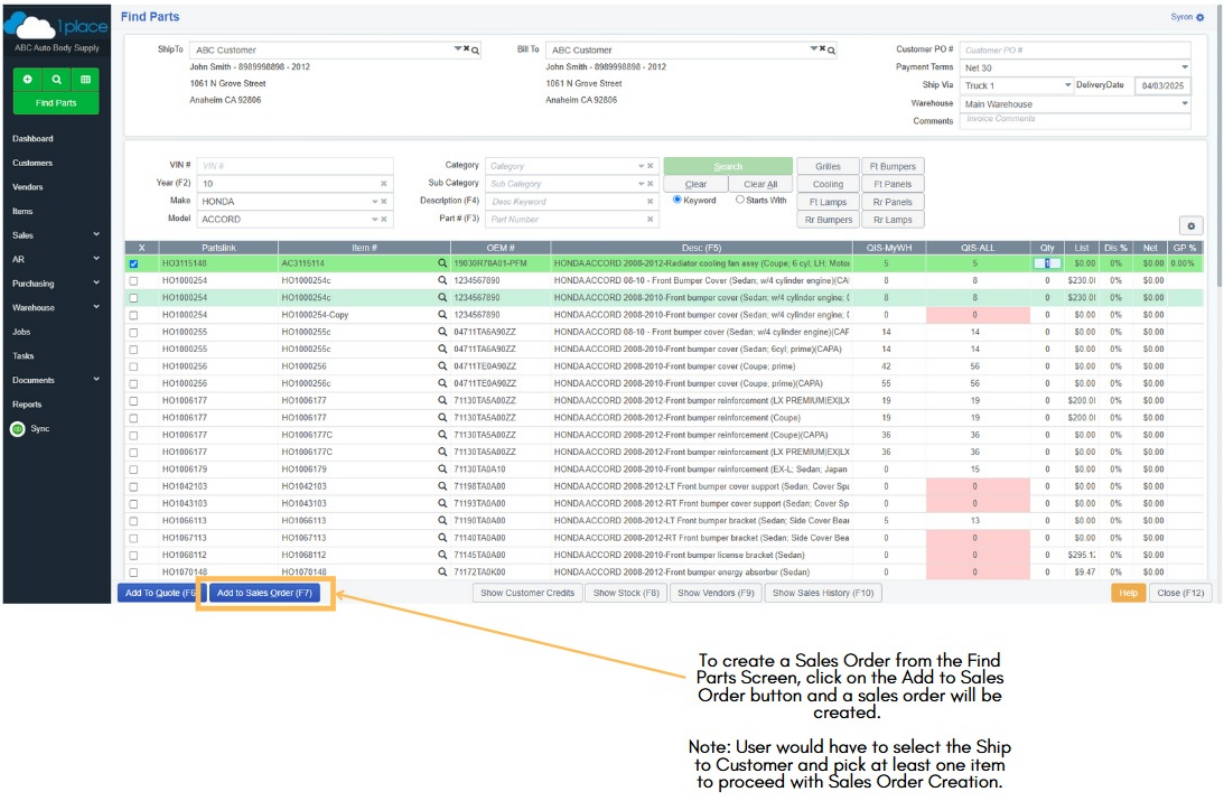
Line 1 (Column Filters/Fields)	Description
Qty Ord	Quantity Order
Category	
Item #	The unique code for each item in your inventory that is used on Sales Orders, Invoice
DS (Drop Ship - checkbox)	Check this box if opting for drop shipping.
Qty Ship (Quantity Ship)	The quantity (of the item) committed or shipped to the Customer.
Qty BO (Quantity Back Order)	The quantity (of the item) that needs to be purchased to fulfill an order.
Prev Shp (Previous Ship)	The quantity (of the item) previously shipped to the Customer (from the last transac
Qty Rtn (Quantity Return)	The quantity (of the item) returned by the Customer, if any.
Description	Specified item description which includes the Year, Make, Model and item category.
PO (checkbox)	This is checked when **Qty Ord** is greater than **Qty Ship**.
PO#	The Purchase Order Number generated by the system.
List Price	The basic price of an item in your catalog. Also known as the Suggested Retail Price.
Unit Price	
Disc % (Discount)	The discount % applied to the item on a Sales Order transaction.
Net Price	The final Price offer of an item (after any markups or discounts).
Tax (checkbox)	This is checked when an item is taxable.
Line Total	The total Price computation (before taxes) of each Line item on the Sales Order.
Date Shipped	
Group	
Transfer From WH	
Shipped From WH	
Comments	Displays any system notes from Orders coming from the Customer Portal. (Optional
Status	The Shipping - Sales Order Status (i.e. New, To Print & Pick, Picking, To Dispatch, In I
Vendor	Neme of Supplier or Vendor.
Serial #	The unique code or part identifier of a specific item.
Invoice CM #	
Gross Margin	
Unit Cost	
Bin	This is an *alpha-numeric* field used by the Stock Picking Tickets to arrange the order t
Lot/Serial #	

- **Tabs (section)** - *see below.*
- **Footer (section)**
    - **New** (button) - To create a new Sales Order record.
    - **Delete** (button) - To delete that SO screen.
    - **Refresh** (button)
    - **Create Invoice & Print** (button)
    - **Create Invoice** (button)
    - **Create PO(s)** (button)
    - **Send Email** (button)
    - **Print** (button)
    - **Save** (button) - To save the actions/changes made on that screen.
    - **Help** (button) - Leads you to self-help articles about the **Sales Order** screen.
    - **Close** (button) - To close that screen.

- Shortcut Key: **Ctrl + F6**, or

- On the **Quick Start Menu**, click the + icon and select **Sales Order**, or
- Click the **New** button on the lower left part of the **Sales Order List** screen, or
- Click the **New** button on the lower left part of any **Sales Order** screen, or
- On any **Quotation** screen, click **Create Sales Order** button to make a Sales Order record for that particular customer.

- On the Find Parts Screen, select a Ship to Customer from the list.
- Search for Parts by Year, Make, Model, Category and Sub Category, Description and Item #. At least 1 item must be selected.
- Once selected, click on the Add to Sales Order button and it will create a New Sales Record.



- Using **Shortcut Key**: **F6**, or
- On the **Quick Start Menu**, click the **Search** (magnifying glass) icon then select **Sales Order**, or
- (If already on the **Sales Order List** screen) use the Search feature (magnifying glass icon) to type the Sales Order number or any information/keywords to filter multi search, or
- On any **Quotation** or **Invoice** screens, click the magnifying glass icon beside the Sales Order # (upper right part of the screen). This will display the particular Sales Order record associated with that Quotation or Invoice.

- Shortcut Key: **Shift+F6**, or
- On the **Quick Start Menu**, click the **List** button and select **Sales Orders**, or
- On the **Main Menu Bar**, click **Sales>Sales Orders**.

- On the **Sales Order** List screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or

- Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion, or
- On the **Sales Order** screen, click **Delete** button (lower left part of the screen).
- Note: To preserve the integrity of the database, you cannot delete any Sales Order record that has been used on any of the screens such as Sales Order PO's, Quotes, Invoice etc.

- Make sure to input the **Customer name** first (**Bill To** and **Ship To** textboxes) to enable the adding of Line Item/s. Fill in other detailed information as indicated on the upper part of the screen.
- On the **Add/Edit Line Item** table section, click on the **Item# drop down arrow** icon to select the particular line item. Input the **Quantity Order** then click **Commit Line Item.** Click **Save & Submit Order.**
- Note: You cannot Add/Edit Line Item/s on Sales Order screen when Invoice has already been created for that particular Sales Order.
- Optional Preferences:
    - You may choose to enable **Auto-Fill Ship Qty With Order Qty**. This automatically fills in **Ship Qty** when **Order Qty** is filled. This also enables creation of Invoice on the Sales Order screen.
        - To do this, go to **Settings>Sales>Sales Order Settings**. Under the **Sales Order Preferences** section, check **Auto-Fill Ship Qty With Order Qty**.
- Other icon functions:
    - **Audit Log** (icon): Allows you to view details of any changes or updates made on the Sales Order Add/Edit Line Item section.
    - **Gear** (icon): Check to enable display of the fields on Lines 1 and 2 on the Sales Order Add/Edit Line Item section.
    - **Double down arrow** (icon): Toggle to see Line 2 column of Sales Order Add/Edit Line Item table.

- On the **Sales Order** screen (under the **Add/Edit Line Item** section), click the **X** icon (under the **Actions** column) on the row of the particular Line Item that you want to delete. Click **Yes** then **Save**.
- Note: You cannot delete Line Item/s on Sales Order screen when Invoice has already been created for that particular Sales Order.

- On the Sales Order Screen, click on the arrow down (dropdown) button located beside the Bill to Company Name Field.
- A dropdown list of customers will be shown and below it is the +Add New button that will allow user to add a new customer record.
- A pop-up screen will appear where user will be required to fill out customer details and click on the Save button located at the lower right corner to Save the new customer record.

How to Open a Customer Record on the Sales Order Screen

- On the Sales Order Screen, click on the magnifying glass icon beside the x button on the bill to customer field.
- A new tab will open with the Customer Detail Screen of the selected customer.

How to Open a Item Record on the Sales Order Screen

- On the Sales Order Screen, click on the magnifying glass icon beside the item #.
- A new tab will open with the Item Detail Screen of the selected item #.

If you're taking a sales order and realize that the customer's information needs to be updated, follow these steps:

1. **Open the Customer Detail Screen**
    - On the **Sales Order screen**, click the **magnifying glass icon** next to the **Bill To** field.
    - This will open the **customer detail screen** for the selected customer in a new tab.
2. **Make the Necessary Updates**
    - Locate the information you need to update (e.g., address, phone number, email) and make the changes.
    - Be sure to click **Save** once you're done.
        1. Note: If you do not have permission to edit customer information, please contact your administrator.
3. **Refresh the Customer Info on the Sales Order**
    - Return to the **Sales Order tab** you were working on.
    - To refresh the updated customer information:
        - Click the **(x)** next to the selected customer in the Bill To field to clear it.
        - Reselect the **same customer** from the list.
4. **Review the Changes**
    - Verify that the updated information is now reflected on the Sales Order.

- On the **Main Menu** bar, click on **Reports > Sales Orders.**
- Define your Report.
    - **1place** allows you to generate different types of Sales Order Reports according to your needs. Pick from the type of Sales Order Report (i.e. Sales Order By Customer, Sales Orders - Back Orders, Sales Orders - Totals Per Dasy, etc.) from the **Reports section.**
        - Note: You can adjust the period covered by your report. On the **Report Period** filter section, select from the **drop down** filter lists or manually input the dates 'from' and 'to'.
- Click on **Run Report**.
    - Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    - Note2: At this point, you may choose to Print, Email or Download your Report copy.

- After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
- On the **Customize Report popup** screen:
    - (Optional) Select the **Min Access Level** from the **drop down** icon.
    - (Required) Type in the **Report Name** (whatever you want to call your Report).
    - (Optional) Type in any **Report Description**.
    - (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck

    box(es) of the column(s) that you prefer to show/hide.
    - Click on **Save.**
    - Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
    - Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
    - Note3: Click on the **X** button to permanently delete any Custom Report from the list.
- Note: You have the option to Email, Print or Download a Report copy (see instructions below).

- On the **Sales Order List** screen:
    - Select the record(s) by checking the box(es) .
    - Click the

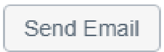
      button to Print and

      to download (in Excel form).
    - There is also an option to Share

      record(s) and this feature will be available in the future.
- For Sales Order Reports, go to **Main Menu** Bar > **Reports** > **Sales Orders,** create your Report (*see previous instructions) then click on the

  button (upper right).
- The **Print Preview** popup screen will appear.
    - DOWNLOAD COPY: Click on

      button (upper right) to download the Report. Save in your PC.
    - EMAIL COPY: Click on

      button (lower right) to send a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

      button (lower right).
    - PRINT COPY: Click on

      button (upper right) to print the Report. Adjust Print Settings then click on

      button (lower right).

Displays any system notes from Orders coming from the Customer Portal such as email address of the logged in user and the search term used to locate the item.
Input any comments or notes related to the particular Sales Order transaction.

This tab shows any advance or deposit payments for the particular Sales Order.

- To Apply a Deposit/ Pre-Payment on a Sales Order:
  - On the **Sales Order** screen, click on the **Payment Info** tab then click on the **Receive/Edit Payment(s)** button.
  - The **Payments** popup screen will show.
    - **GL Account**: If necessary, select a specific GL account. Otherwise, select 'Undeposited Funds' account (to make a deposit later on).
    - **Date Paid**: If necessary, change the (default) date.
    - **Payment Method**: Choose the type of payment.
    - **Check #**: If necessary, enter a check or card number.
    - **Authorization #**: Enter the credit card authorization number.
    - **Amount Tendered:** Input the Deposit Amount.
  - Click on **Apply Payment**.
    - Note: You cannot add or edit any payments on the Sales Order that has already been invoiced.

Article coming soon.

Article coming soon.

An Invoice is made after the fulfillment of Customer's order. On the **Sales Order** screen, creating invoice is enabled once the **Qty Ship** (on the Add/Edit Line Item table) has been filled.

- On the **Sales Order** screen, click **Create Invoice** button (bottom part of the screen).
- Optional Preferences:
  - You may choose to enable **Auto-Print Invoice** to make the **Create Invoice & Print** button visible (just beside the **Create Invoice** button). This will automatically direct you to the print options instantly after creating the invoice.
    - To do this, go to **Settings>Sales>Sales Order Settings**. Under the **Sales Order Preferences** section, check **Auto-Print Invoice**.

When **Qty Ship** is less than **Qty Ord**, creating a Purchase Order is enabled as an option to accommodate the Sales Order.

- Do the following to create a Purchase Order that is initiated by a Sales Order or what we call the **Sales Order Purchase Order.**
  - On the **Sales Order** screen, click **Create PO(s)** button.
  - On the Sales Order Purchase Orders (to create) screen, click on the Vendor drop down list to select the vendor or supplier from which you intend to buy the particular item.

- On the **Sales Order** screen, input the item number with back order.
- Click on **Create PO(s)** button on the bottom part of the screen. This will direct you to the **Sales Order Purchase Orders (to create)** screen.
- The default will show the current Sales Order with the back ordered item. You can click on **Show All** to look all the other back orders.
- Check the **Sales Order** you want to create a PO.
- Select **Vendor** on the **drop down**.

- Click on the **Proceed (Show Prebuild Summary)** button. A **Sales Order PO's - Prebuild Summary** popup will be displayed.
- You can either add the back ordered item on an existing PO by selecting the PO number under the **Existing PO drop down** arrow or create a new PO by checking the **Create PO** box.
- Click on **Create/Add to PO's** button.
- Look in the **Purchase Order List** screen to find the newly created PO.

Duplicating a sales order allows you to quickly create a new order with the same items, customer, and details as an existing order, saving time when processing repeat orders.

Steps:

1. **Open the Sales Order**
    - Navigate to the **Sales Orders** screen
    - Open the **sales order** you want to duplicate
2. **Duplicate the Order**
    - Click **More** on the bottom of the screen
    - Select **Duplicate Sales Order**
3. A new **sales order** will be created with the same **items**, **quantities**, and **customer information** as the original order.

- Add a new Sales order **(Ctrl + F6).**
- On the **Sales Order** screen:
    - Input **Bill To**, **Ship To** etc as you usually do when creating a Sales Order.
    - Add the item by selecting the specific **Item #** from the **drop down** list.
    - Check the **DS** (**Drop Shipping**) box. (Note: If you cannot find **DS** column, click on the **Gear** icon (above right of the table) then check the box for **DS** field to make it appear on the table columns.)
    - Input **Qty Ord and Qty BO.** (Important Note: The **Qty Ship** must indicate '0' value because you will not be shipping from your warehouse but from your Vendor to your Customer).
    - Click on **Commit Line Item** (red) button. (Notice that the **PO** box column is checked and the **PO #** column is still blank which means that the system is suggesting that you create a PO)
    - Click on **Save & Submit Order** button.
    - Note: At this point, the system will not allow (yet) the creation of Invoice because line items are not yet shipped. We then proceed to PO creation (instructions below).

Follow the steps below if you need to fulfill a Sales Order by shipping the items from a Vendor directly to your Customer.

- On the **Sales Order** screen of the Dropship Order:
    - Click on **Create PO(s)** button. This will automatically open the **Sales Order Purchase Orders (to create)** screen.

- On the **Sales Order Purchase Orders (to create)** screen:
    - Tick the **circle** icon for **Customer (Drop Ship)**
      Customer (Drop Ship)
      found above right of the screen.
    - Select your **Vendor** from the drop down list.
    - Input **Vendor Cost**.
    - Click on **Proceed (Show Prebuild Summary)** button.
    - On the **Sales Order PO's - Prebuild Summary popup** screen:
        - Click on **Create/Add to PO's** button.
        - You have just created the Dropship Purchase Order.

- **Confirm item availability of the item(s) with the Vendor** by sending an email (to the Vendor) with PO attachment.
    - To do this, (on the **Purchase Order** screen) click on
      Send Email
      button to create an email and send the Purchase Order to the Vendor.
        - At this point, you may close the **Purchase Order** screen and just come back later when you receive your Vendor's confirmation.
    - Once item availability is confirmed:
        - Go back to the **Purchase Order** screen of that particular PO transaction.
        - Click on the **Rcvd** checkbox (second column on **Add/Edit Line Item** section).
        - An auto prompt will appear asking if you want to **Auto Ship Sales Order Back Orders.** Click **Yes.**
        - Click on the related **Sales Order** of the Line Item (**magnifying glass** icon of the Sales Order # on the **Add/Edit Line Item** section).
    - Note: At this point, you may proceed with Invoice creation:
        - On the **Sales Order** screen:
            - Click on **Create Invoice** button.
        - Email the Invoice to ShipTo Customer.
            - On the **Invoice** screen, click on
              Send Email
              button to create an email and send the Sales Invoice to the ShipTo Customer.

- (NOTE: As of 1/31/23) Stock transfers created to ship a **Sales Order** that doesn't have enough stock in the local warehouse must be created using the **Find Parts - Auto** screen.
- Step 1: A Sales Order is created with special characteristics that help us track the shipment:
    - SalesOrderLineItems (table)
        - TransferFROM Warehouse (visible on line 2 of the Sales Order line items)
        - ShippiedFROM Warehouse (visible on line 2 of the Sales Order line items)
        - PickType (visible on the Warehouse > Shipping & Receiving screen)
        - SOStatus (Sales Order LineItem STATUS) (only visible in the tables)
        - TransferComplete (As of 2/1/23 coming soon: visible on line 2 of the Sales Order line items)
    - StockTransfer
        - TransferStatus (Hidden in tables)
    - StockTransferStatuses
        - NextStatus (Hidden in tables)
- Step 2:
    - The item is displayed on the Ship/Rec screen of the TransferFROM Warehouse UNTIL the Sales Order Line Item Transferred checkbox = TRUE.