How to Create a Sales Order using the Sales Order Screen

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Overview

Use the **Sales Order** screen in 1place to enter a customer's order directly. You'll confirm who will be billed and where the items will go, then add the items, review the prices, and submit the order.

Steps

1. **Start a new sales order.**
   Go to **Sales > Sales Orders** and click **New** at the bottom left of the list.
   If you already have a sales order open, click **New** at the bottom left of that screen. You can also press **Ctrl + F6**.
2. **Select the customer and delivery location.**
   In **Bill To**, select the customer responsible for payment. In **Ship To**, confirm the recipient and delivery address.
3. **Review the order details.**
   Confirm the warehouse fulfilling the order and the shipping method. Review the payment terms and enter the customer's PO number if they provided one.
4. **Add the items.**
   In **Add/Edit Line Item**, select the **Item #** and enter the quantity the customer ordered in **Qty Ord**. Review the description and **Unit Price**, then click **Commit Line Item**. Repeat for each item.
5. **Review and submit.**
   Verify the customer, delivery details, line items, quantities, and order total. Click **Save & Submit Order**.

After submitting the order

Use **Warehouse > Shipping & Receiving** to check the order's status and see when it's ready for picking. If you need to buy an item to fulfill the order, see How to Create Sales Order POs for Each Individual Sales Order.

If the customer already accepted a quote in 1place, you can open that quote and use **Create Sales Order** to carry its details into the order. For other options on the order screen, see Sales Order Screen – How To's.