

Creating an Sales Order

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1 Creating an Sales Order

1.1 Goods Out - Sales Order Maintenance

The Sales Order Maintenance screen is used to create sales orders within the system. Sales orders can be created manually or via EDI.

There are 2 stages to creating a sales order; header and detail.

The Sales Order Maintenance screen can be found in the Sales Allocation and Picking folder.

The following section covers how to manually create a sales order.

Creating the Sales Order Header:

The screenshot shows the 'Sales Order Header Maintenance' screen in the Calidus (3PL) v7.70 DEV application. The window title is 'Sales Order Header Maintenance'. The top menu bar includes Action, Edit, Query, Block, Record, Field, Window, and Help. The toolbar contains icons for New, Open, Save, Print, and Exit. The status bar shows the date '18-OCT-2010' and version 'SOS1110 v4.43'. The main area contains several input fields:

- Entered By: [Text Box]
- Int Audit No: [Text Box]
- Owner: XXA 001
- Customer: [Text Box] (highlighted in yellow)
- Request Type: S
- Pricing Band: [Text Box]
- Order Priority: [Text Box]
- Order No.: [Text Box]
- Order Type: H
- Reference: [Text Box] (highlighted in yellow)
- Customer Ref.: [Text Box]
- Haulier Code: [Text Box]
- Carrier Code: [Text Box]
- Routing Code: [Text Box]
- Select Type: [Text Box]
- Return Indicator: [Text Box]
- Order Status: [Text Box]
- Complete Delivery: [Text Box]
- Order Entry Date: [Text Box]
- Balance: [Text Box]
- Order Value: 0.00
- Credit Limit: [Text Box]
- Service Level: [Text Box]
- Delivery Mode: D
- Route/Load: +
- Start Due: [Text Box]
- End Due: [Text Box]
- Book Date/Time: [Text Box]
- Book Ref: [Text Box]
- Sales Type: I
- Direct Delivery: N
- Depot Code: [Text Box]
- Contact Surname: [Text Box]
- Phone: [Text Box]
- Sales Region: [Text Box]
- COD Flag: [Text Box]
- COD Cash Amt: [Text Box]
- COD Reference: [Text Box]

The only two fields that are required are ?Customer? and ?Reference?.

The ?Customer? field is the customer to where the order is being sent to. The user can either enter the customer code or select a code from the list of values.

The ?Reference? field is a blank text field that can be populated with any required data. There is no validation within the field.

All other fields are optional.



After the customer code has been entered the system will generate a unique Order Number (see screen shot below).

Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Header Maintenance

Company: JP1 Department: 0000 18-OCT-2010 SOS1110 v4.43

Order Details Change Delivery Address Warehouse Transfers Misc Charges Totals Reference

Entered By: LEN	Complete Delivery: <input type="checkbox"/>
Int Audit No: 352	Order Entry Date: 18-OCT-2010 12:27 Balance: <input type="text"/>
Owner: XXA 001	Order Value: 0.00 Credit Limit: <input type="text"/>
Customer: X-001 001	Service Level: <input type="text"/>
Request Type: S	Delivery Mode: D
Pricing Band: <input type="text"/>	Route/Load: +
Order Priority: <input type="text"/>	Start Due: <input type="text"/>
Order No.: XXA0000000000000352	End Due: <input type="text"/>
Order Type: H	Book Date/Time: <input type="text"/>
Reference: <input type="text"/>	Book Ref: <input type="text"/>
Customer Ref: <input type="text"/>	Sales Type: I Direct Delivery: N
Haulier Code: <input type="text"/>	Depot Code: <input type="text"/>
Carrier Code: <input type="text"/>	Contact Surname: <input type="text"/>
Routing Code: <input type="text"/>	Phone: <input type="text"/>
Select Type: <input type="text"/>	Sales Region: <input type="text"/>
Return Indicator: <input type="checkbox"/>	COD Flag: <input type="checkbox"/>
Order Status: 0 Order Entered	COD Cash Amt: <input type="text"/>
COD Reference: <input type="text"/> More Options	

Enter the reference number. Remember this is just a text field with no validation. Press the Save icon to continue.



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Header Maintenance

Company: JP1 Department: 0000 18-OCT-2010 SOS1110 v4.43

Order Details Change Delivery Address Warehouse Transfers Misc Charges Totals Reference

Entered By: LEN	Complete Delivery: <input type="checkbox"/>
Int Audit No: 352	Order Entry Date: 18-OCT-2010 12:27 Balance: <input type="text"/>
Owner: XXA 001	Order Value: 0.00 Credit Limit: <input type="text"/>
Customer: X-001 001	Service Level: <input type="text"/>
Request Type: S Sales Orders	Delivery Mode: D DIRECT ROUTE
Pricing Band: <input type="text"/>	Route/Load: +
Order Priority: <input type="text"/>	Start Due: <input type="text"/>
Order No.: XXA0000000000000352	End Due: <input type="text"/>
Order Type: H Home (English)	Book Date/Time: <input type="text"/> 00:00
Reference: TEST 12345	Book Ref: <input type="text"/>
Customer Ref: <input type="text"/>	Sales Type: I Direct Delivery: <input type="checkbox"/>
Haulier Code: <input type="text"/>	Depot Code: <input type="text"/>
Carrier Code: <input type="text"/>	Contact Surname: <input type="text"/>
Routing Code: <input type="text"/>	Phone: <input type="text"/>
Select Type: <input type="text"/>	Sales Region: <input type="text"/>
Return Indicator: <input type="checkbox"/>	COD Flag: <input type="checkbox"/>
Order Status: 0 Order Entered	COD Cash Amt: <input type="text"/>
COD Reference: <input type="text"/> More Options	

Creating the Sales Order Detail:

Press the ?More Options? button to continue:



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Header Maintenance

Company: JP1 Department: 0000 18-OCT-2010 SOS1110 v4.43

Order Details	Change Delivery Address	Warehouse Transfers	Misc Charges	Totals	Reference
Entered By: LEN	Complete Delivery: <input type="checkbox"/>	Order Entry Date: 18-OCT-2010	12:27	Balance: <input type="text"/>	
Int Audit No: 352	Order Value: 0.00	Credit Limit: <input type="text"/>			
Owner: XXA 001	Service Level: <input type="text"/>				
Customer: X-001 001	Delivery Mode: D DIRECT ROUTE				
Request Type: S Sales Orders	Route/Load: +				
Pricing Band: <input type="text"/>	Start Due: <input type="text"/>				
Order Priority: <input type="text"/>	End Due: <input type="text"/>				
Order No.: XXA0000000000000352	Book Date/Time: <input type="text"/> 00:00				
Order Type: H Home (English)	Book Ref: <input type="text"/>				
Reference: TEST 12345	Sales Type: I	Direct Delivery: <input type="checkbox"/> N			
Customer Ref: <input type="text"/>	Depot Code: <input type="text"/>				
Haulier Code: <input type="text"/>	Contact Surname: <input type="text"/>				
Carrier Code: <input type="text"/>	Phone: <input type="text"/>				
Routing Code: <input type="text"/>	Sales Region: <input type="text"/>				
Select Type: <input type="text"/>	COD Flag: <input type="checkbox"/> N				
Return Indicator: <input type="text"/>	COD Cash Amt: <input type="text"/>				
Order Status: 0 Order Entered	COD Reference: <input type="text"/>				More Options

Select ?Line Details?.



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Header Maintenance

Company: JP1 Department: 0000 18-OCT-2010 SOS1110 v4.43

Order Details Change Delivery Address Warehouse Transfers Misc Charges Totals Reference

Entered By: LEN	Complete Delivery: <input type="checkbox"/>		
Int Audit No: 352	Order Entry Date: 18-OCT-2010 12:27 Balance: <input type="text"/>		
Owner: XXA 001	Order Value: 0.00 Credit Limit: <input type="text"/>		
Customer: X-001 001	Service Level: <input type="text"/>		
Request Type: S Sales Orders	Delivery Mode: D DIRECT ROUTE		
Pricing Band: <input type="text"/>	Route/Load: +		
Order Priority: <input type="text"/>	Start Due: <input type="text"/>		
Order No.: XXA0000000000000352	End Due: <input type="text"/>		
Order Type: H Home (English)	Book Date/Time: <input type="text"/> 00:00		
Reference: TEST 12345	Book Ref: <input type="text"/>		
Customer Ref: <input type="text"/>	Sales Type: I Direct Delivery: <input type="checkbox"/> N		
Haulier Code: <input type="text"/>	Depot Code: <input type="text"/>		
Carrier Code: <input type="text"/>	Contact Surname: <input type="text"/>		
Routing Code: <input type="text"/>	Phone: <input type="text"/>		
Select Type: <input type="text"/>	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <input type="button" value="Line Details"/> <input type="button" value="Order Notes"/> <input type="button" value="Invoice Notes"/> </div> <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> <input type="button" value="Create Del Addr"/> <input type="button" value="Cancel Order"/> <input type="button" value="POD"/> </div> <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> <input type="button" value="Create Inv Addr"/> <input type="button" value="Invoicing"/> <input type="button" value="Exit Options"/> </div>		
Return Indicator: <input type="checkbox"/>			
Order Status: 0 Order Entered			

It is now possible to enter the product and quantities:



The following details are required:

Line Type - The default option for this is STD (Standard), by pressing tab through the field, the system will automatically default to using 2STD.

Stockist - This will default to the current Owner/Stockist code set against the user

Product Code - Enter the product code or use the list of values to select from

Cases / Units - The number of cases or units to be sent



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Detail Lines

Company: JP1 Department: 0000 18-OCT-2010 SOS1117 v4.43

Owner Code	XXA	001	Order No.	XXA00000000000000352	Total Cases/Units	22	0
Customer	X-001	001	Entered By	LEN	Total Qty	264	

Line Type	Stockist	Product Code	Description	Cases	Rotation Units	P/M	SAP Order		
Pallet	Identifier	Reason	Ref			Price	Line No	Ret.Ind	
1 - Standard	XXA	001	001001	Shirt (red)	10	0	3.00		Pick Instr.
1 - Standard	XXA	001	001002	Shirt (blue)	5	0	3.00		Pick Instr.
1 - Standard	XXA	001	001004	Dr Pepper	7	0	3.00		Pick Instr.
					0	0			Pick Instr.
									Cancel Line

Once all lines have been entered, press the exit button to return to the main header screen.



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

Sales Order Header Maintenance

Company: JP1 Department: 0000 18-OCT-2010 SOS1110 v4.43

Order Details Change Delivery Address Warehouse Transfers Misc Charges Totals Reference

Entered By: LEN	Complete Delivery: <input type="checkbox"/>
Int Audit No: 352	Order Entry Date: 18-OCT-2010 12:27 Balance: <input type="text"/>
Owner: XXA 001	Order Value: 0.00 Credit Limit: <input type="text"/>
Customer: X-001 001	Service Level: <input type="text"/>
Request Type: S Sales Orders	Delivery Mode: D DIRECT ROUTE
Pricing Band: <input type="text"/>	Route/Load: +
Order Priority: <input type="text"/>	Start Due: <input type="text"/>
Order No.: XXA0000000000000352	End Due: <input type="text"/>
Order Type: H Home (English)	Book Date/Time: <input type="text"/> 00:00
Reference: TEST 12345	Book Ref: <input type="text"/>
Customer Ref: <input type="text"/>	Sales Type: I Direct Delivery: <input type="checkbox"/>
Haulier Code: <input type="text"/>	Depot Code: <input type="text"/>
Carrier Code: <input type="text"/>	Contact Surname: <input type="text"/>
Routing Code: <input type="text"/>	Phone: <input type="text"/>
Select Type: <input type="text"/>	Sales Region: <input type="text"/>
Return Indicator: <input type="checkbox"/>	COD Flag: <input type="checkbox"/>
COD Cash Amt: <input type="text"/>	
COD Reference: <input type="text"/>	
Order Status: 1 Committed	
More Options	

As you can now see the Order Status is now showing committed (see screen shot above).



2 Document History

Version	Date	Status	Reason	Initials
Version1	09/11/2010	Released		SPM

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