

Creating an Sales Order

Aptean Ltd
Copyright © 2011-2025.

Contents

- 1 Creating an Sales Order.....1
 - 1.1 Goods Out - Sales Order Maintenance.....1
- 2 Document History.....9

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 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

Int Audit No: 352

Owner: XXA 001

Customer: X-001 001

Request Type: S

Pricing Band:

Order Priority:

Order No.: XXA0000000000000000352

Order Type: H

Reference:

Customer Ref.:

Haulier Code:

Carrier Code:

Routing Code:

Select Type:

Return Indicator:

Order Status: 0 Order Entered

Complete Delivery:

Order Entry Date: 18-OCT-2010 12:27 Balance:

Order Value: 0.00 Credit Limit:

Service Level:

Delivery Mode: D

Route/Load: +

Start Due:

End Due:

Book Date/Time:

Book Ref:

Sales Type: I Direct Delivery: N

Depot Code:

Contact Surname:

Phone:

Sales Region:

COD Flag:

COD Cash Amt:

COD Reference:

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
 Int Audit No: 352
 Owner: XXA 001
 Customer: X-001 001
 Request Type: S Sales Orders
 Pricing Band:
 Order Priority:
 Order No.: XXA00000000000000352
 Order Type: H Home (English)
 Reference: TEST 12345
 Customer Ref.:
 Haulier Code:
 Carrier Code:
 Routing Code:
 Select Type:
 Return Indicator:
 Order Status: 0 Order Entered

Complete Delivery:
 Order Entry Date: 18-OCT-2010 12:27 Balance:
 Order Value: 0.00 Credit Limit:
 Service Level:
 Delivery Mode: D DIRECT ROUTE
 Route/Load: +
 Start Due:
 End Due:
 Book Date/Time: 00:00
 Book Ref.:
 Sales Type: I Direct Delivery: N
 Depot Code:
 Contact Surname:
 Phone:
 Sales Region:
 COD Flag: N
 COD Cash Amt:
 COD Reference:

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
 Int Audit No: 352
 Owner: XXA 001
 Customer: X-001 001
 Request Type: S Sales Orders
 Pricing Band:
 Order Priority:
 Order No.: XXA00000000000000352
 Order Type: H Home (English)
 Reference: TEST 12345
 Customer Ref.:
 Haulier Code:
 Carrier Code:
 Routing Code:
 Select Type:
 Return Indicator:
 Order Status: 0 Order Entered

Complete Delivery:
 Order Entry Date: 18-OCT-2010 12:27 Balance:
 Order Value: 0.00 Credit Limit:
 Service Level:
 Delivery Mode: D DIRECT ROUTE
 Route/Load: +
 Start Due:
 End Due:
 Book Date/Time: 00:00
 Book Ref.:
 Sales Type: I Direct Delivery: N
 Depot Code:
 Contact Surname:
 Phone:
 Sales Region:
 COD Flag: N
 COD Cash Amt:
 COD Reference:

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: ☐

Int Audit No: 352 Order Entry Date: 18-OCT-2010 12:27 Balance:

Owner: XXA 001 Order Value: 0.00 Credit Limit:

Customer: X-001 001 Service Level:

Request Type: S Sales Orders Delivery Mode: D DIRECT ROUTE

Pricing Band: Route/Load: +

Order Priority: Start Due:

Order No.: XXA00000000000000352 End Due:

Order Type: H Home (English) Book Date/Time: 00:00

Reference: TEST 12345 Book Ref:

Customer Ref.: Sales Type: I Direct Delivery: N

Haulier Code: Depot Code:

Carrier Code: Contact Surname:

Routing Code: Phone:

Select Type:

Return Indicator:

Order Status: 0 Order Entered

Line Details Create Del Addr Create Inv Addr

Order Notes Cancel Order Invoicing

Invoice Notes POD Exit Options

It is now possible to enter the product and quantities:



Calidus (3PL) v7.70 DEV

Action Edit Query Block Record Field Window Help

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

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

Line Type	Stockist	Product Code	Description	Cases	Rotation	P/M	SAP Order
Pallet	Identifier	Reason	Ref		Units	Price	Line No. Ret.Ind
				0	0		
							Pick Instr.
							Pick Instr.
							Pick Instr.
							Pick Instr.
							Pick Instr.
							Cancel Line

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 ?STD?.

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

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	P/M	SAP Order
Pallet	Identifier	Reason	Ref		Units	Price	Line No
1 - Standard	XXA	001	001001	Shirt (red)	10	0	3.00
	0						
							Pick Instr.
1 - Standard	XXA	001	001002	Shirt (blue)	5	0	3.00
	0						
							Pick Instr.
1 - Standard	XXA	001	001004	Dr Pepper	7	0	3.00
	0						
							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
 Int Audit No: 352
 Owner: XXA 001
 Customer: X-001 001
 Request Type: S Sales Orders
 Pricing Band:
 Order Priority:
 Order No.: XXA00000000000000352
 Order Type: H Home (English)
 Reference: TEST 12345
 Customer Ref.:
 Haulier Code:
 Carrier Code:
 Routing Code:
 Select Type:
 Return Indicator:
 Order Status: 1 Committed

Complete Delivery:
 Order Entry Date: 18-OCT-2010 12:27 Balance:
 Order Value: 0.00 Credit Limit:
 Service Level:
 Delivery Mode: D DIRECT ROUTE
 Route/Load: +
 Start Due:
 End Due:
 Book Date/Time: 00:00
 Book Ref.:
 Sales Type: I Direct Delivery: N
 Depot Code:
 Contact Surname:
 Phone:
 Sales Region:
 COD Flag: N
 COD Cash Amt:
 COD Reference:

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

Copyright Aptean © 2008

The information contained herein is the property of Aptean and is supplied without liability for errors or omissions. No part may be reproduced or used except as authorised by contract or other written permission. The copyright and foregoing restriction on reproduction and use extend to all media in which the information may be embodied

